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ABSTRACT

In 1997, Maryland formed the Task Force on Education Funding Equity, Accountability, and Partnerships to ensure that students throughout Maryland have an equal opportunity for academic success. The Task Force's preliminary report features a comprehensive review of education funding and programs in grades K-12. The report presents membership and subcommittee rosters, a chronology of task force meetings, guiding principles of the task force, a summary of full committee meetings and public involvement, and critical issues and recommendations, the latter of which constitutes the bulk of the report and examines enhanced funding for at-risk students, including state funding for at-risk programs, targeted-improvement grants, professional development programs, and the maintenance of effort provision. The task force concentrated on Prince George's County public schools, since this district contained a significant percentage of at-risk students. It focuses on a desegregation lawsuit, the community schools education plan, school construction, teacher certification, professional development, financial accountability, public/private partnerships, effective management, work-force skills development, promoting success, and eliminating barriers. Eight appendices list the charge of the task force, targeted-improvement program charts, a corporate partnership on managerial excellence, and other information. (RJM)

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# Task Force On Education Funding Equity, Accountability, and Partnerships

## Preliminary Report

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**Annapolis, Maryland**

**January 1998**

EA 029 427

# Task Force On Education Funding Equity, Accountability, and Partnerships

## Preliminary Report

Annapolis, Maryland

January 1998

For further information concerning this document contact:

Department of Legislative Services
90 State Circle
Annapolis, Maryland 21401

Baltimore: (410) 841-3710 • Washington: (301) 858-3710
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# Task Force on Education Funding Equity, Accountability, and Partnerships

January 1998

Governor Parris N. Glendening
Speaker Casper R. Taylor, Jr.

On behalf of the Task Force on Education Funding Equity, Accountability, and Partnerships, I respectfully submit our preliminary report.

In July of this year, you appointed this 28-member task force and asked me to serve as its chairman. In addition, you appointed three subcommittee chairmen: Timothy F. Maloney for funding equity; Rosetta Kerr Wilson for accountability; and Lawrence A. Shulman for partnerships. Other members include members of the House of Delegates, the State Superintendent of Schools, other State and local government officials, and representatives of the education and business communities.

The task force was charged with undertaking a comprehensive review of education funding and programs in grades K-12 to ensure that students throughout Maryland have an equal opportunity for academic success. One of the main goals was to determine if inequities or gaps exist in funding programs earmarked for Maryland students who are believed to be "at risk" of failing in school. Further, we were asked to look at current accountability systems to provide assurances to the General Assembly and the public that school systems and school leaders are held accountable for meeting appropriate educational and fiscal standards. Finally, we were asked to see if the State can better leverage the money it currently spends and make use of all available public and private resources.

Early in our work, several general briefings made it clear to members that, while a statewide perspective was crucial, one jurisdiction--Prince George's County--warranted additional attention. Prince George's County Public Schools, which is the largest school system in the State, has 41.2 percent of its students approved for free and reduced priced meals. Previous research has shown a correlation between this indicator and poor student performance. Since the beginning of the Maryland School Performance Assessment Program, Prince George's schools have consistently ranked near the bottom of Maryland's public school systems. Further, the Prince George's County Schools has asked the federal court to modify court-ordered desegregation remedies, which have been in place for 25 years, and to require the State and Prince George's County to contribute nearly $1 billion in operating and capital funds for desegregation purposes. In a letter dated August 12, 1997 Governor Glendening asked the task force to examine the issues surrounding the desegregation lawsuit and make recommendations, if appropriate. Given these factors, the task force expended considerable time and effort examining ways to increase State assistance for and oversight of this school system.



Legislative Services Building . 90 State Circle . Room 200 . Annapolis, Maryland 21401-1991
(410) 841-3710 . FAX (410) 841-3722 . TDD (410) 841-3814
(301) 858-3710 . FAX (301) 858-3722 . TDD (301) 858-3814

To guide the work of the task force we adopted a set of four principles, one for the task force in general and one for each of the subcommittees. These principles guided our work and are found on page 17 of this report.

The task force and its subcommittees held a total of 28 meetings, five of which were public hearings. These hearings covered a wide range of topics, including local aid and education finance, school construction, the Maryland School Performance Program (MSPP), teacher certification, the Prince George's County Schools desegregation lawsuit, and enrollment issues.

Being faithful to the charge, the task force has adopted a number of recommendations that we believe address the needs of Maryland's students, particularly the "at risk" population, while using a statewide approach. These recommendations would increase State funding for education by approximately $61 million. **Table 1** gives an overall summary of the costs of the major funding proposals, while **Table 2** shows the county-by-county distribution of these funds.

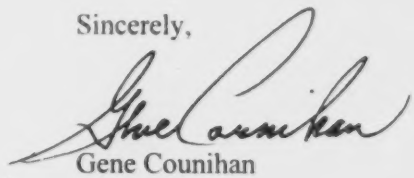
The majority of this new funding would result from a new Targeted Improvement Program (TIP) to target $44.5 million in additional State funds to "at-risk" children, particularly students from low-income households and with limited English skills. The Aging School Program and funds to assist Prince George's County make up the bulk of the remaining funding proposals. All recommendations of the task force are summarized in **Table 3**. Further, a two volume Technical Supplement, with much of the supporting documentation to the task force's work, is available upon request.

In closing, I want to emphasize that the task force did find gaps in funding programs for "at risk" students. We identified areas where accountability measures were not in place. We looked for opportunities to build more partnerships with the private sector. Our recommendations are essential first steps in closing the funding and accountability gaps and increasing school partnerships. We are committed to working with you to ensure that the recommendations contained herein are funded and implemented. Please call upon us to provide any needed assistance during the 1998 legislative session.

The task force will reconvene after session to complete our work by addressing those areas where time did not permit a full review of the issue.

Finally, I appreciate the vision and leadership you provided in establishing the task force. I want to express my sincere thanks to the members for their active involvement and to the staff for their diligent work.

Sincerely,



Gene Counihan
Chairman

**Table 1**
**Total Funding Recommended by Task Force**

| **FY 1999 State Operating Budget Funding** | **( $ in millions )** | |
|---|---|---|
| **Program** | **Redirected Funds** | **New Funds** |
| Targeted Improvement Program (sunset in 4 years) | $2.0 (Challenge) | $44.5 |
| MSDE -- MIS enhancement ($2.6 FY00, $0.8 FY01 and beyond) | | 4.0 |
| Magnet and Other Effective Schools in Prince George's County Schools | 14.1 (Magnet) | 2.0 |
| Statewide Pilot Integrated Student Services | | 1.0* |
| Statewide Pilot Teacher Certification and Professional Development | | 3.0* |
| Prince George's County Schools performance audit (1/3 of cost) | | .2 |
| Supplemental Aging School Program (sunset in 4 years) | | 6.0 |
| **Total** | **$16.1** | **$60.7** |

* initially focused on Prince George's County

Prepared by: Department of Legislative Services, January 1998

**Table 2**

## Additional State Funding for Local School Systems Recommended by Task Force

**Fiscal 1999**

| County | TIG | LEP | EEEP | Teacher Development | Aging Schools | Other* | Total** |
|---|---|---|---|---|---|---|---|
| Allegany | $528,766 | $4,250 | $57,541 | $192,000 | $205,000 | $0 | $987,557 |
| Anne Arundel | 613,020 | 439,150 | 200,241 | 232,000 | 330,000 | 0 | 1,814,411 |
| Baltimore City | 4,328,217 | 511,350 | 694,491 | 1,392,000 | 1,515,000 | 0 | 8,441,058 |
| Baltimore | 1,517,801 | 1,197,800 | 100,759 | 5,584,000 | 1,190,000 | 0 | 9,590,360 |
| Calvert | 131,928 | 15,300 | 143,029 | 8,000 | 40,000 | 0 | 338,257 |
| Caroline | 268,570 | 61,700 | 51,770 | 64,000 | 50,000 | 0 | 496,040 |
| Carroll | 188,470 | 67,900 | 14,270 | 48,000 | 205,000 | 0 | 523,640 |
| Cecil | 286,108 | 30,200 | 162,011 | 80,000 | 205,000 | 0 | 763,319 |
| Charles | 352,523 | 71,600 | 144,439 | 96,000 | 40,000 | 0 | 704,562 |
| Dorchester | 205,025 | 32,400 | 70,036 | 72,000 | 40,000 | 0 | 419,461 |
| Frederick | 359,543 | 126,900 | 180,082 | 80,000 | 50,000 | 0 | 796,525 |
| Garrett | 187,450 | 0 | 36,312 | 120,000 | 50,000 | 0 | 393,762 |
| Harford | 502,561 | 135,900 | 174,311 | 128,000 | 220,000 | 0 | 1,160,772 |
| Howard | 203,756 | 810,850 | 72,500 | 24,000 | 40,000 | 0 | 1,151,106 |
| Kent | 60,062 | 30,550 | 55,541 | 56,000 | 40,000 | 0 | 242,153 |
| Montgomery | 1,058,962 | 7,037,650 | 313,759 | 568,000 | 660,000 | 0 | 9,638,371 |
| Prince George's | 3,961,390 | 4,254,300 | 336,226 | 1,088,000 | 550,000 | 6,000,000 | 16,189,916 |
| Queen Anne's | 70,236 | 20,350 | 59,426 | 32,000 | 50,000 | 0 | 232,012 |
| St. Mary's | 283,822 | 59,800 | 261,134 | 96,000 | 50,000 | 0 | 750,756 |
| Somerset | 184,870 | 31,850 | 39,729 | 72,000 | 40,000 | 0 | 368,449 |
| Talbot | 44,239 | 28,950 | 20,541 | 48,000 | 95,000 | 0 | 236,730 |
| Washington | 464,220 | 153,650 | 103,416 | 200,000 | 110,000 | 0 | 1,031,286 |
| Wicomico | 429,573 | 166,650 | 22,541 | 128,000 | 205,000 | 0 | 951,764 |
| Worcester | 86,336 | 38,200 | 51,656 | 80,000 | 40,000 | 0 | 296,192 |
| Unallocated | | | 1,000,000 | | | | 1,000,000 |
| Total | $16,317,448 | $15,327,250 | $4,365,761 | $10,488,000 | $6,020,000 | $6,000,000 | $58,518,459 |

TIG = Targeted Improvement Grant

LEP = Limited English Proficiency Grant

EEEP = Extended Elementary Education Grant

*Other includes $1 million in new State funds for an integrated student support services pilot program in Prince George's County and $3 million for a statewide program to assist provisional teachers in becoming fully certified and to develop teacher mentor programs, with the initial focus being on Prince George's County. Prince George's County also receives $2 million in new funds for effective schools. This is in addition to the $14.1 million in magnet school funds that the task force recommended be redirected to magnet and other effective schools.

**$2 million is budgeted under the Challenge School Program, thus the net cost to the State is $56,518,459.

Prepared by the Department of Legislative Services, January 1998

## Table 3
## Summary of Recommendations

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 1. | Establish a new categorical grant program for students living in poverty based on the number of students receiving free and reduced price meals and local wealth. **(Targeted Improvement Grant - pg. 52)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 and sunset in four years | Maryland State Department of Education | $16.3 million |
| 2. | Increase the current LEP grant from $500 to $1,350 per LEP student and repeal the current two-year restriction on students receiving LEP funding. **(Limited English Proficiency Grant - pg. 53)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 and sunset in four years | Maryland State Department of Education | $15.3 million |
| 3. | Establish a statewide teacher development program for schools with a free or reduced price meal count of 25% or more of their student population. Each eligible school will receive an $8,000 grant to enhance teacher development. In addition, Baltimore County will receive an additional $5 million to enhance its current teacher mentoring program. **(Professional Development Programs - pg. 53)** | Legislative and Executive | Enacted during the1998 Session/ Funded beginning in July 1998 and sunset in four years | Maryland State Department of Education | $10.5 million |
| 4. | The Maryland State Department of Education and local school systems should expand existing professional development programs for school-based administrators and develop new programs that would assist these individuals in dealing with "at-risk" students. **(Professional Development Programs - pg. 54)** | Legislative, Executive, and Local | On-going | Maryland State Department of Education/ Local Boards of Education | Indeterminate |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 5. | Expand the Extended Elementary Education Program by an additional 24 sites statewide and increase the level of funding for 204.5 existing sites. **(Extended Elementary Education Program - pg. 54)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 and sunset in four years | Maryland State Department of Education | $4.4 million |
| 6. | Supports the accountability framework provided for in the Targeted Improvement Program. **(TIP Accountability Measures - pg. 55)** | Legislative and Executive | On-going | Maryland State Department of Education | No Impact |
| 7. | Provide MSDE with additional funding in order to improve the department's information processing capabilities for tracking and measuring the impact of additional aid and staff at poor performing schools. **(TIP Accountability Measures - pg. 55)** | Legislative and Executive | Funding beginning in July 1998 | Maryland State Department of Education | $4 million |
| 8. | Codify the Targeted Improvement Program in statute and have it sunset in four years. **(Codify Targeted Improvement Program - pg. 56)** | Legislative and Executive | Enacted during the 1998 Session | Maryland State Department of Education | No Impact |
| 9. | Include a maintenance of effort and nonsupplantation provision in any legislation providing additional targeted aid to local school districts. **(Maintenance of Effort Provision - pg. 56)** | Legislative and Executive | Enacted during the 1998 Session | Maryland State Department of Education | No Impact |
| 10. | Reaffirm the State's constitutional commitment to provide all students in the State with a thorough and efficient education independent of the outcomes of any litigation. **(Prince George's County Public School Proposals - pg. 61)** | N/A | N/A | N/A | N/A |
| 11. | Endorses MSDE's concern with the Prince George's County Board of Education's Community School Education Plan. **(Prince George's County Public School Proposals - pg. 62)** | N/A | N/A | N/A | N/A |

14

15

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 12. | Endorses MSDE's recommendation to redirect $14.1 million in State funding currently earmarked for Prince George's County's magnet school program to support research-proven intervention strategies in the county and to provide an additional $2 million in State funds for magnet and other effective schools. **(Prince George's County Public School Proposals - pg. 64)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 | Maryland State Department of Education | $2 million |
| 13. | Endorses MSDE's recommendation to provide Prince George's County with $1 million in new State funds for a pilot integrated student support services program and $3 million to assist provisional teachers in becoming fully certified and to establish teacher mentor programs. **(Prince George's County Public School Proposals - pg. 64)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 | Maryland State Department of Education | $4 million |
| 13a | Recommends that the General Assembly and Board of Public Works examine the accountability and academic performance issues as part of any increased operating or capital funding commitments to the Prince George's County Public Schools. The task force believes that funding and accountability issues cannot be separated, and that any new funding commitments should be accompanied by appropriate accountability measures. **(Prince George's County Public School Proposals - pg. 67)** | Legislative and Executive | On-going | Maryland General Assembly, Board of Public Works | N/A |
| 14. | Conduct a performance audit of the Prince George's County Public School System. The State will share one-third of the cost of the audit not to exceed $200,000. The State should not contribute its share until the Management Oversight Panel is appointed. **(Prince George's County Public School Proposals - pg. 67)** | Legislative, Executive, and Local | On-going | Maryland State Department of Education, Prince George's County and Prince George's County Board of Education | $200,000 |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 15. | Establish a Management Oversight Panel for the performance audit of the Prince George's County Public School System jointly appointed by the Governor, Prince George's County Executive, and Prince George's County Board of Education Chairman from a list of qualified individuals submitted by the State Board of Education and State Superintendent of Schools. The panel must be appointed by February 1, 1998. **(Prince George's County Public School Proposals - pg. 67)** | Legislative, Executive, and Local | On-going | Governor, Prince George's County Executive | No Impact |
| 16. | Task force notes that after reviewing the needs of Prince George's County for school construction, Dr. Stenzler concluded that annual requests of $25 million to $35 million from Prince George's County would not be unreasonable. **(School Construction - pg. 70)** | N/A | N/A | N/A | N/A |
| 16a | Task force endorses $200 million for school construction in fiscal 1999, an increase of $59 million in PayGo funds over the amount previously indicated, and an amount supported by the Governor, House leadership, and county executives. **(School Construction - pg. 69)** | Executive and Legislative | Funded beginning July 1, 1998 | Interagency Committee on School Construction | No operating budget impact |
| 17. | Establish the Supplemental Aging School Program. **(School Construction - pg. 73)** | Legislative and Executive | Enacted during the 1998 Session/ Funded beginning in July 1998 and sunset in four years | Interagency Committee on School Construction | $6.0 million |
| 18. | Supports the concept of multiple usage of schools and libraries. Requests the Interagency Committee on School Construction to report back to the task force with recommendations for the promotion of multiple use of local facilities. **(School Construction - pg. 75)** | Administrative | Report by 1998 Interim | Interagency Committee on School Construction | No Impact |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 19. | The Task Force endorses MSDE moving forward with regulatory proposals to address provisional teacher certification issues. **(Certification and Mentoring of Teachers - pg. 76)** | Regulatory | On-going | Maryland State Department of Education | Indeterminate |
| 20. | MSDE should establish a statewide comprehensive program to address the large number of teachers with provisional certification. **(Certification and Mentoring of Teachers - pg. 76)** | Administrative | On-going | Maryland State Department of Education | Indeterminate |
| 21. | The State Scholarship Administration should evaluate reestablishing the tuition scholarship program for candidates to become teachers in Maryland public schools. **(Certification and Mentoring of Teachers - pg. 76)** | Administrative | On-going | State Scholarship Administration | Indeterminate |
| 22. | Each local school system should consider implementing a teaching mentoring program. **(Certification and Mentoring of Teachers - pg. 79)** | Local | On-going | Local Boards of Education | Indeterminate Impact on local funds |
| 23. | Supports continued advocacy and State support for professional development initiatives and requests that MSDE study the professional development issues raised by the task force and report its recommendations to task force by June 1, 1998. **(Professional Development - pg. 80)** | Administrative | Report to Task Force by June 1, 1998 | Maryland State Department of Education | No Impact |
| 24. | MSDE should convene a study group of interested parties to examine the process of evaluating professionally certificated personnel and the feasibility of linking the performance of principals to the performance of their schools and the performance of teachers to the performance of their students. **(Professionally Certificated Personnel Accountability for Student Performance - pg. 81)** | Administrative | 1998 Interim | Maryland State Department of Education | No Impact |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 25. | MSDE should create a study group to examine the issues surrounding financial accountability and report its recommendations to the task force after the 1998 legislative session. **(Financial Accountability - pg. 82)** | Administrative | 1998 Interim | Maryland State Department of Education | No Impact |
| 26. | Governor and the General Assembly should continue to publicly support the Maryland School Performance Program (MSPP) and provide financial resources for the program to ensure adequate funding. **(Maryland School Performance Program - pg. 83)** | Legislative and Executive | On-going | Maryland General Assembly and Governor | No Impact |
| 27. | MSDE should seek assurances from each local education agency (LEA) that the school system is taking action to improve low performing schools that are continuing to decline on MSPP performance indicators. **(Maryland School Performance Program - pg. 83)** | Administrative and Regulatory | On-going | Maryland State Department of Education | No Impact |
| 28. | MSDE should expand regulations to require local school systems to use MSPP data to guide school level change in school improvement plans. In addition, MSDE should require each LEA to report the overall system report card to its citizens and ensure that each school provide copies of its MSPP report card to the parents and guardians of the school's students. **(Maryland School Performance Program - pg. 83)** | Regulatory | On-going | Maryland State Department of Education | No Impact |
| 29. | MSDE should develop regulations requiring all schools, not just reconstitution eligible schools, to evaluate their school improvement plans on an annual basis. In addition, local school systems should target resources to schools to meet the needs identified in school improvement plans. **(Maryland School Performance Program - pg. 84)** | Regulatory | On-going | Maryland State Department of Education | No Impact |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 30. | Task Force believes that MSDE needs additional funding in order to provide the necessary support for school improvement to the local school systems. Adequate resources should also be provided to the department to implement the Internet technology that is being designed by MSDE and the University of Maryland. **(Maryland School Performance Program - pg. 84)** | Legislative and Executive | On-going | Maryland State Department of Education | Indeterminate |
| 31. | Use private-sector expertise to evaluate local school system's administrative, logistical, and planning processes. **(Partnerships - pg. 87)** | Local and Private Sector | On-going | Local Boards of Education | No Impact (cost of evaluation would be absorbed by the corporate partners) |
| 32. | Encourage each local school system to identify a corporate education specialist or partnership coordinator to facilitate the development of public/private partnership. **(Partnerships - pg. 88)** | Local and Private Sector | On-going | Local Boards of Education | Indeterminate Impact on local funds. School systems may be able to use existing staff for this position. |
| 33. | Encourage private-sector employees to work as teaching assistants to provide additional classroom assistance to students. **(Partnerships - pg. 90)** | Administrative, Local, and Private Sector | On-going | Maryland State Department of Education/ Local Boards of Education | Indeterminate |
| 34. | Produce a ten-year technology and workforce assessment of the skills needed by high school graduates to succeed in the workplace of the future. **(Partnerships - pg. 92)** | Administrative | On-going | Maryland State Department of Education | Indeterminate |

| | Recommendation | Necessary Action | Time Frame | Lead Agency/ Organization | Fiscal Impact |
|---|---|---|---|---|---|
| 35. | Identify a private-sector partner to develop and manage a web page of private-sector continuing education programs available at no cost to teachers and school administrators. **(Partnerships - pg. 94)** | Administrative, Local, and Private Sector | On-going | Local Boards of Education/ Maryland State Department of Education | No Impact |
| 36. | Establish an annual statewide forum for educators and business leaders to showcase ideas for developing partnerships. **(Partnerships - pg. 95)** | Administrative, Local, and Private Sector | On-going | Maryland State Department of Education/ Local Boards of Education | Indeterminate |
| 37. | Enhance the role of the Teacher of the Year by providing additional opportunities for the person. **(Partnerships - pg. 96)** | Administrative and Local | On-going | Maryland State Department of Education | Indeterminate |
| 38. | Supports legislation amending the Workers' Compensation Act to apply to students who engage in unpaid learning experiences. **(Partnerships - pg. 97)** | Legislative and Executive | Enacted during the 1998 Legislative Session | Maryland General Assembly | Minimal Increase |
| **Combined fiscal effect of task force's recommendations:** | | | | | **$60.7 million*** |

*Does not include $2 million that is budgeted under the Challenge School Program and indeterminate costs.
N/A means not applicable.

Prepared by the Department of Legislative Services, January 1998

# Membership Roster

## Task Force on Education Funding Equity, Accountability, and Partnerships

### 1997 Interim
### Membership Roster

Mr. Gene Counihan, **Chairman**
Mr. Timothy F. Maloney, **Subcommittee Chair, Funding**
Mr. Lawrence A. Shulman, **Subcommittee Chair, Public/Private Partnerships**
Ms. Rosetta Kerr Wilson, **Subcommittee Chair, Accountability**

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Delegate Howard P. Rawlings
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Mr. Garland Williamson
Delegate Betty Workman

**Committee Staff**
Julie Weinberg
Rachel Hise
Crystal Banks-Martin
Hiram Burch
Laurie Liddell
Lynne Blume-Rosen
John Rohrer
Mary Dwyer

# Subcommittee Roster

## Task Force on Education Funding Equity, Accountability, and Partnerships
### Subcommittee Assignments

| | | | |
|---|---|---|---|
| Mr. Michael A. Butera | Funding Equity | | |
| Mr. Barry Campbell | | | Partnerships |
| Delegate James W. Campbell | Funding Equity | | |
| Delegate Norman H. Conway | Funding Equity | | |
| Mr. Gene Counihan | N/A | N/A | N/A |
| Delegate Jean Cryor | Funding Equity | | |
| Delegate Michael J. Finifter | | Accountability | |
| Ms. T. Eloise Foster | Funding Equity | | |
| Ms. Sandra H. French | | Accountability | |
| Mr. Jewel Gould | | | Partnerships |
| Dr. Nancy Grasmick | Funding Equity | | |
| Delegate Sheila E. Hixson | | | Partnerships |
| Delegate Kenneth Holt | | | Partnerships |
| Ms. Lisa Jackson | | | Partnerships |
| Delegate Nancy K. Kopp | Funding Equity | | |
| Mr. Timothy F. Maloney | Funding Equity | | |
| Mr. Sean Looney (for Ms. Sherry Bellamy) | | | Partnerships |
| Mr. William T. Middleton | Funding Equity | | |
| Ms. Joanne S. Parrott | | Accountability | |
| Delegate James E. Proctor, Jr. | Funding Equity | | |
| Delegate Howard P. Rawlings | | Accountability | |
| Mr. Ronald V. Russell | Funding Equity | | |
| Mr. Larry Shulman | | | Partnerships |
| Mr. Walter Sondheim, Jr. | | Accountability | |
| Mr. John C. Sprague | | Accountability | |
| Ms. Rosetta Kerr Wilson | | Accountability | |
| Mr. Garland Williamson | Funding Equity | | |
| Delegate Betty Workman | | Accountability | |

# Chronology of Task Force Meetings

**Task Force on Education Funding Equity, Accountability, and Partnerships**
**Mr. Gene Counihan, Chairman**

**Subcommittee on Accountability, Ms. Rosetta Kerr Wilson, Chair**
**Subcommittee on Education Funding Equity, Mr. Timothy F. Maloney, Chair**
**Subcommittee on Public/Private Partnerships, Mr. Lawrence A. Shulman, Chair**

**1997 Interim**

**SCHEDULE**

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| Date | Location & Time | Subject |
|---|---|---|
| **August 12** | JHR, 5:30 pm | ***Full Task Force***<br>Organization Meeting and Overview of Education Funding |
| **September 9** | JHR, 5:30 pm | ***Full Task Force***<br>Overview of Education Accountability and Public/Private Partnerships |
| **September 17** | JHR, 5:30 pm | ***Full Task Force***<br>Governor's Budget Outlook, Overview of School Construction Program, Local Aid Overview and Trends, and Education Equity Issues |
| **September 22** | Ways and Means Committee Room<br>3:00 - 5:00 pm | ***Subcommittee on Accountability***<br>Finalize Agenda |
| **September 29** | 11921 Rockville Pike<br>5:00 pm | ***Subcommittee on Public/Private Partnerships***<br>Local Partnerships<br>• Darla Strouse, MSDE |

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|---|---|---|
| **October 6** | Room 431, House Office Building<br>3:00 - 5:00 pm | ***Subcommittee on Accountability***<br>Performance Accountability: Utilization of the Maryland School Performance Program (MSPP) Data by the Maryland State Department of Education and the Local Education Agencies |
| **October 6** | 11921 Rockville Pike<br>5:00 pm | ***Subcommittee on Public/Private Partnerships***<br>Business Perspectives on Public/Private Partnerships<br>Teacher Certification & Teacher Aides - Current Law Requirements |
| **October 14** | Ways and Means Committee Room<br>4:00 pm<br>(Note change in time) | ***Subcommittee on Education Funding Equity (joint w/Accountability Subcommittee)***<br>Briefing on the Prince George's County Schools Desegregation Lawsuit |
| **October 16** | Room 431, House Office Building<br>3:00 - 5:00 pm | ***Subcommittee on Accountability***<br>Personnel Accountability: Evaluation of School Personnel and Staff Development of Teachers |
| **October 22** | Ways and Means Committee Room<br>4:00 pm | ***Subcommittee on Education Funding Equity (joint w/Accountability Subcommittee)***<br>Briefing on Programs for Children At Risk |
| **October 23** | 11921 Rockville Pike<br>5:00 pm | ***Subcommittee on Public/Private Partnerships***<br>At Risk Schools |

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| **October 27** | Prince George's Community College<br>Rennie Forum<br>Largo Student Center<br>Largo, MD<br>7:00 pm | ***Subcommittee on Accountability***<br>Public Hearing |
| **October 29** | Montgomery College<br>Room 216<br>Germantown, MD<br>7:00 pm | ***Subcommittee on Education Funding Equity***<br>Public Hearing |
| **October 30** | Baltimore City Community College<br>(Liberty Campus)<br>Gaare Auditorium<br>Nursing Building<br>Baltimore, MD<br>7:00 pm | ***Subcommittee on Public/Private Partnerships***<br>Public Hearing |
| **November 3** | Room 431, House Office Building<br>3:00 - 5:00 pm | ***Subcommittee on Accountability***<br>Work Session / Decision Meeting |
| **November 3** | 11921 Rockville Pike<br>5:00 pm | ***Subcommittee on Public/Private Partnerships***<br>Decision Meeting |
| **November 5** | Ways and Means Committee Room<br>4:00 pm | ***Subcommittee on Education Funding Equity (joint w/Accountability Subcommittee)***<br>State Superintendent's Analysis of Desegregation Plan for Prince George's County Public Schools |

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| **November 10** | Room 431, House Office Building<br>3:00 pm - 5:00 pm | ***Subcommittee on Accountability***<br>Work Session / Decision Meeting |
| **November 10** | 11921 Rockville Pike<br>5:00 pm | ***Subcommittee on Public/Private Partnerships***<br>Decision Meeting |
| **November 12** | JHR, 5:30 pm | ***Full Task Force***<br>Briefing on Attendance Count and Legislative Audit; Discussion of Principles; Partnerships Subcommittee Report |
| **November 18** | Ways and Means Committee Room<br>4:00 pm | ***Subcommittee on Education Funding Equity (joint w/Accountability Subcommittee)***<br>Analysis of School Construction Needs in Desegregation Plan for Prince George's County Public Schools |
| **November 24** | MSDE, 7th Floor Board Room, Baltimore<br>12:00 p.m. | ***Subcommittee on Accountability***<br>Work Session / Decision Meeting |
| **November 25** | Ways and Means Committee Room<br>5:30 pm | ***Subcommittee on Education Funding Equity***<br>Briefing on School Construction and Aging School Program, Work Session / Decision Meeting |

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|---|---|---|
| **December 2** | Appropriations Committee Room 5:30 pm | ***Full Task Force*** Work Session/Review Funding and Accountability Subcommittee Reports |
| **December 9** | Ways and Means Committee Room 5:00 pm | ***Subcommittee on Education Funding Equity*** Work Session |
| **December 9** | JHR, 7:00 pm | ***Full Task Force*** Public hearing on draft report followed by brief work session at 9:00 pm |
| **December 11** | Maple Elementary School, Cambridge, MD 7:00 p.m. | ***Full Task Force*** Public Hearing on Draft Report |
| **December 16** | JHR, 5:30 pm | ***Full Task Force*** Review preliminary report |
| **January 6, 1998** | Appropriations Committee Room 5:30 p.m | ***Full Task Force*** Decision Meeting |

Notes: JHR - Joint Hearing Room, Legislative Services Building, 90 State Circle, Annapolis, MD
TBD - To be determined.

**Direct Inquiries to:**
Mary Dwyer
Department of Legislative Services
90 State Circle, Room 226
Annapolis, Maryland 21401
(410) 841-3710 (Baltimore/Annapolis Area)
(301) 858-3710 (Washington, DC Area)

**Full Task Force:**
Julie Weinberg/Rachel Hise

**Accountability Subcommittee:**
Lynne Blume-Rosen/Laurie Liddell

**Funding Equity Subcommittee:**
Rachel Hise/Hiram Burch

**Public/Private Partnerships Subcommittee:**
Crystal Banks-Martin/Julie Weinberg

# Guiding Principles of the Task Force

## Guiding Principles of the Task Force

Given the breadth of the subject area, task force members agreed on the need to focus their work. The following principles were adopted with this need in mind:

**General**

- The task force is committed to a statewide perspective in looking at the educational needs of all public school students in Maryland, particularly the needs of at-risk students. Any needs of students in one jurisdiction must be viewed in the context of the needs of students in similar situations in other jurisdictions throughout the State.

**Funding Equity**

- The task force is committed to addressing the educational needs of students at-risk of not achieving their full education potential, who often require greater resources to achieve the State's high educational standards. Through a targeted approach, the task force will focus on closing the gaps in funding for at-risk students throughout the State.

**Accountability**

- The task force is strongly committed to program, funding, and personnel accountability. This includes holding local governments and local education agencies accountable as the recipients of State funding, closing the gaps that exist in current accountability mechanisms including assuring non-supplantation of existing funds, and maintenance of effort as defined in law and regulation. For newly funded programs, a coordinated approach, using proven strategies or promising practices, together with strong accountability measures targeted to student performance is essential.

**Partnerships**

- The task force believes that public and private community and family partnerships working together with local schools are essential to learning. The task force is committed to: encouraging innovative programs; identifying and facilitating the establishment of partnerships; and providing incentives and support services, including staff, expertise, and resources to promote them.

# Summary of Full Committee Meetings

## Summary of Full Task Force Meetings

*August 12, 1997*

**Summary of Past Education Studies**

Mr. Hiram Burch, Analyst, Department of Legislative Services, presented a summary of past education studies.

Since 1970, ten study groups have been convened to examine how Maryland finances public education and to determine whether all students receive a thorough and adequate education. These study groups have had an important impact on how the State distributes funding to local school districts. The State's existing basic support program (basic current expense formula) is primarily a by-product of recommendations from two study groups created in the early 1970's (Hughes Commission and the Lee Task Force). Further, the State's Public School Construction Program, which will provide local school districts with over $144 million in fiscal 1998, was recommended by the Hughes Commission. During the late 1980s, the focus shifted to school accountability and student performance. Through recommendations of the Sondheim Commission, the State established the Maryland School Performance Program, which has become a national model in monitoring school performance. During the 1990s, due to budgetary constraints at the State level, the outcomes from study groups have been more tailored, addressing specific problems such as providing additional aid to students in poverty (targeted poverty grants) or with limited English proficiency.

**Overview of Education Funding**

Mr. John Rohrer and Mr. Hiram Burch, Department of Legislative Services, presented an overview of education funding, highlighting the different ways State assistance is provided to local school districts and how the aid addresses certain educational objectives.

Maryland's approach to education funding is similar to most other states with regards to the basic funding formula used to distribute State assistance to local school systems. As in 39 other states, Maryland uses a foundation program that provides a minimum level of per pupil funding. Further, Maryland, like most states, uses categorical programs to achieve certain objectives that are not met through the foundation program. Currently, there are over 30 separate programs comprising around 40 percent of State education aid. Maryland is one of seventeen states that does not adjust the student enrollment count for special needs. Instead, Maryland relies on separate student counts such as limited English proficiency and free and reduced priced meal counts to distribute additional aid to school districts. Also, Maryland tends to contribute a smaller share of education funding than most states. In fiscal 1995, Maryland ranked 38th in the nation in the share of education funding. Finally, Maryland is one of 14 states where local school districts are fiscally dependent on another unit of local government.

**Overview of 1997 Baltimore City Schools Reform Legislation**

Ms. Rachel Hise, Analyst, Department of Legislative Services, presented an overview of the 1997 Baltimore City Schools Reform Legislation, SB 795 (Chapter 105).

On November 26, 1996 the parties to three lawsuits over the adequacy of education for Baltimore City school children and special education services signed an agreement that provided additional funding for city schools and included management reforms. City and State officials agreed to $254 million in new State aid to the city and to restructure the management of the Baltimore City Public Schools.

Senate Bill 795 (Chapter 105) incorporates the substantive elements of the consent decrees with respect to the management and education reforms. In addition, the bill provides additional funds for the Baltimore City public schools in the following amounts: $30 million in fiscal 1998 and $50 million in each fiscal year 1999 through 2002. The Act establishes the New Baltimore City Board of School Commissioners, consisting of nine voting members and one nonvoting student member and transfers to the New Board the functions formerly performed by the Superintendent of Public Instruction and the Board of School Commissioners of Baltimore City. The Mayor of Baltimore and the Governor will jointly appoint the voting members of the Board from a list of names submitted by the State Board of Education. The Board must employ a Chief Executive Officer, who will select a management team, including a Chief Academic Officer and a Chief Financial Officer. The new board must adopt a Transition Plan by September 1997, and a Master Plan by March 1, 1998. The Master Plan must be reviewed and approved by the State Board of Education and State Superintendent.

***September 9, 1997***

**Overview of Education Accountability Initiatives**

Ms. Laurie Liddell and Ms. Lynne Blume Rosen, Analysts, Department of Legislative Services, provided an overview of educational accountability.

Accountability in education encompasses two types of accountability: (1) inputs or measurements of education finances, community characteristics, student characteristics, and the number and qualifications of teachers; and (2) outputs or measures of student and teacher performance. Overall, the Maryland State Department of Education (MSDE) requires the local education agencies (LEAs) to submit considerable detail regarding operations, both financial and staff related. The LEAs are required by State law to report revenues and expenditures under specific categories. MSDE also provides further guidance to the LEAs in the Financial Reporting Manual concerning how to report expenditures, and each LEA complies by providing MSDE with a detailed breakdown of their expenditures for both program areas and object. The data that the LEAs provide MSDE is aggregated in the broad reporting categories and published in several reports. Although MSDE compiles considerable data, little analysis of the data is done by the department.

In recent years, MSDE has concentrated its reform efforts on outcome based measurements including student and teacher performance. It is the belief of MSDE that the intent of the State law is to vest control of local school boards budgets and expenditures at the local level. MSDE has indicated that as long as school systems are making progress toward meeting the School Performance Program standards, control of budgets and expenditures should remain at the local level.

**Overview of Public and Private Education Partnerships**

Ms. Darla Strouse, Director of Partnerships for the Maryland State Department of Education, and Ms. June Streckfus, Executive Director Maryland Business Roundtable for Education provided an overview of the diversity of partnerships in existence around the State and emphasized the need to cultivate and sustain public/private partnerships.

The variety of businesses and other education partnerships in Maryland affirm that education is at the top of the State's agenda as a preeminent issue. The participation of the business community has developed so widely and deeply that now it is almost assumed and many policies adopted bear the mark of business interests in clear standards and accountability. Interest has extended from an original narrow concern with skills needed to produce employable citizens to wide-ranging concerns for the preparation, recruitment, pay, and treatment of teachers, and for improvement in the ways in which schools are organized, managed, and financed. Business collaboratives are now working with educators in the restructuring of schools and reorganization of education systems.

***September 17, 1997***

**Governor's Budget Outlook**

Secretary Frederick W. Puddester, Department of Budget and Management, presented a four year projection of the Governor's Budget. From fiscal year 1998 through fiscal year 2001, aid to LEAs will have an average increase of 5.2 percent. Current projections indicate that school aid is growing at a faster rate than revenues. Revenues are inspected to increase only by 2.9 percent from fiscal year 1998 through fiscal year 2001.

**Spending Affordability Process**

Mr. John Rohrer, Principal Analyst, Department of Legislative Services, presented an overview of the spending affordability process. In 1982, legislation was enacted creating the Spending Affordability Committee. Under the law, the committee must "review in detail the status and projections of revenues and expenditures of the State and the status and projections of the economy of the State." Each December the committee must recommend to the Governor a spending ceiling for the budget to be submitted to the General Assembly the following January. The Governor is not bound by the limit, but in the event the budget submitted should exceed the limit

recommended, a statement of explanation must accompany the budget submission. The General Assembly may approve a budget which exceeds the limit with explanation.

**Overview of School Construction Program**

Mr. Yale Stenzler, Executive Director, Public School Construction Program, presented an overview on public school construction.

The Public School Construction Program(PSCP) was established by law in 1971 to: (1) provide local tax relief; (2) relieve the subdivisions of the high costs of school construction; (3) address the backlog of new construction, renovation, and replacement of schools; (4) even out the financial impact through the State assumption of these costs; and (5) equalize educational facilities and opportunities throughout the State. Current eligible costs include renovations and additions to existing schools, building new schools, systemic renovations, projects for disruptive youth, and the Aging Schools Program. Since 1972 more than $2.5 billion have been allocated to LEAs. The total funds allocated in fiscal year 1998 amounted to $150 million.

The Interagency Committee on School Construction (IAC) administers the Public School Construction Program(PSCP) under the rules and regulations adopted by the Board of Public Works. The IAC consists of the Superintendent of Schools, the Secretary of General Services, and the Director of Maryland Office of Planning. The Board of Public Works is the final authority on all matters relating to the PSCP.

**Local Aid Overview and Trends**

Mr. John Rohrer presented an overview of State aid and trends in the 1990s.

The reductions in State aid to local governments in the early 1990s, many of which were made permanent in fiscal 1993, resulted in the restructuring of State aid. Although total aid continued to grow, the composition of that aid changed. In fiscal 1990, 67 percent of State aid went to public schools. By fiscal 1998, the schools accounted for 76 percent of aid.

Programs that distribute funds inversely to local wealth account for about 54 percent of fiscal 1998 State aid, up from 39 percent in fiscal 1990. Aid shifts resulted from significant increases in current expense formula aid (education) and major changes in other aid during the State's fiscal crisis. Two policy goals guided the aid changes or restructuring: (1) continue the State's commitment to the public schools; and (2) minimize the impact on reductions on jurisdictions with less ability to raise revenues from local sources.

**Equity and Local Wealth and Tax Effort**

Mr. Hiram Burch and Mr. John Rohrer presented an overview on Education Equity, Local Wealth, and Tax Effort.

Education equity implies that the level and quality of educational services and programs provided to students are generally uniform throughout the State and that a student's place of residence will not affect the student's ability to receive an equal educational opportunity. State aid to LEAs has two primary components: basic support aid to address general education needs of school districts and categorical aid to address specific needs. The State's basic support program addresses differences in localities' ability to raise revenue, whereas categorical programs may or may not address local fiscal capacity. Approximately, 67 percent of State education aid in fiscal 1998 is distributed inversely to local wealth.

*November 12, 1997*

**Approaches to Determining Student Enrollment**

Dr. A. Skipp Sanders, Deputy State Superintendent, and Ms. Debra Greenberg, Internal Auditor, Maryland State Department of Education, provided an overview of approaches to determining student enrollment.

Most states use one of three methods to define the size of student population: enrollment (ENR), average daily attendance (ADA), or average daily membership (ADM). Enrollment is based upon the number of students in membership. This is the method used in Maryland as calculated based upon the number of students enrolled on September 30 each year. The average daily membership is based upon the sum of the days present and absent of all students when school is in session. It is the most common method utilized for determining the size of student populations. The average daily attendance for a given year is based on the aggregate number of enrolled students who are present in school each day of the September to June school year. The percent of average daily attendance is determined by dividing the aggregate number of students in attendance by the aggregate number of students in membership for the school year.

**Enrollment Audit Issue**

Gerald W. Martz, Audit Manager, Office of Legislative Audits, reviewed the findings of a performance audit to evaluate MSDE's procedures for distributing aid to local subdivisions and monitoring the use of these funds.

The Office of Legislative Audits selected a random sample of students from five LEAs (Baltimore City and Frederick, Harford, Montgomery, and Worcester Counties) to test the validity of reported enrollment. Statistical projections of the sample results disclosed that three of the five LEAs tested could not substantiate that minimum attendance and immunization requirements prescribed by State laws and regulations had been met for students for which State and local aid exceeded $200 million. The sample results included instances of students who were ineligible to be counted as enrolled as well as students for which necessary documentation was lacking. For all five LEAs, statistical samples disclosed students for which required information was not maintained and nonstatistical tests disclosed students that were improperly reported as enrolled. A financial

incentive to improve student attendance was lacking since the method for determining LEA enrollment size was not based on attendance for the entire school year as in some states.

# Summary of Public Involvement

## Summary of Public Involvement

The task force went to great lengths to listen to the concerns and ideas of the public. The task force considered using distance learning classrooms around the State to have interactive public hearings, but were unable to find a sufficient number of rooms available at convenient times. Therefore, the task force held five public hearings at the dates and locations noted below:

| Hearing Date | Location |
|---|---|
| Monday, October 27 | Prince George's Community College Largo, MD |
| Wednesday, October 29 | Montgomery College Germantown, MD |
| Thursday, October 30 | Baltimore City Community College, Baltimore, MD |
| Tuesday, December 9 | Joint Hearing Room Maryland General Assembly Annapolis, MD |
| Thursday, December 11 | Maples Elementary School Cambridge, MD |

Press releases announcing the hearings were mailed to over 700 people and organizations. Follow-up reminders were also mailed, and information regarding the hearings was listed in the General Assembly's weekly hearing schedule. In addition, the press release was distributed to a wide array of print, television, and broadcast newsrooms. A summary of the public hearings follows.

## Subcommittee on Accountability
## October 27, 1997 - Prince George's Community College, Largo, MD

The Subcommittee on Accountability received public testimony on October 27 on school and personnel performance accountability. Specifically, the subcommittee requested testimony on the implementation and effectiveness of the Maryland School Performance Program (MSPP) used by the State Department of Education and local school systems to improve the performance of schools. The subcommittee also requested testimony on the effectiveness of the current performance evaluation systems for teachers and other personnel in local school systems and the adequacy of State and local staff development programs. Members present at the hearing included Subcommittee Chair Rosetta Kerr Wilson, Mr. John C. Sprague, Ms. Sandra H. French, and a representative for Ms. Joanne S. Parrott. The subcommittee was also joined by task force Chairman, Mr. Gene Counihan and Subcommittee Chair Mr. Timothy F. Maloney.

The hearing began at 7:00 p.m. The subcommittee received testimony from nine individuals on a variety of subjects related to accountability in public education.

Ms. Mignon Bush Davis testified as an individual. She represented her concerns regarding the lack of State support of Montessori education. She stated that the State's certification process excluded Montessori teachers who have not been trained through the State system. She objects to the exclusion of teachers trained by the association Montessori International under current Maryland State certification regulations. She believes that Prince George's County with more than 900 teachers with provisional certification and Baltimore City with 107 provisional teachers are better serving their customers by hiring the best teachers for their students' needs. MSPAP, national standards and other outcome based practices for accountability are replacing the need for a State certification process. Finally, when asked what she would like done by the subcommittee she stated that she would like all students in Maryland to have access to public school Montessori education.

Ms. Susan R. Buswell, Executive Director of the Maryland Association of Boards of Education (MABE), provided testimony to reinforce some general principals of accountability that have been before the subcommittee. She encouraged the subcommittee to continue to recognize the State's emphasis that has linked accountability to student performance. She also stated her hope that the subcommittee support the belief that there is no single "one size fits all" solution which should be put in place through statute. To be held accountable for student performance the latitude to make decisions must remain with the local boards of education. In response to questions regarding tying teacher evaluations to student performance Ms. Buswell responded that she was unaware of any research that showed that this was possible. In response to a question regarding whether MABE would support language that additional funds provided by the State could not be used to supplant local aid for programs, Ms. Buswell responded that she would need to see the language before MABE would support.

Ms. Louise Waynant, Deputy Superintendent of Prince George's Schools, represented Dr. Jerome Clark, Superintendent of Prince George's County Public Schools. Prince George's County Public Schools priorities include improving student achievement, ensuring a safe and orderly learning environment, enhancing parent and community involvement, and providing a high degree of accountability for student performance and use of resources. Ms. Waynant spoke of the efforts instituted in Prince George's County Public Schools (PGPS) to go beyond the Maryland School Performance Program requirements to obtain accountability. The Twenty First Century Schools initiative involves the restaffing and redesign of the six lowest achieving schools in the system. PGPS Board of Education has had a series of Full Disclosure meetings for the public presenting data related to student achievement, safety, school staffing, teacher certification, school finance and school facilities. All schools must prepare an end-of-year report describing the degree to which goals and objectives in their School Improvement Plans have been met, and specific actions to be taken if identified targets are not reached. In response to questions about Milliken schools, Ms. Waynant indicated that Prince George's County does hold them accountable for achievement similar to all the other schools.

Champe C. McCulloch spoke on behalf of the Maryland Business Roundtable and the Maryland Business Roundtable for Education. He presented three important attributes of school reform that the Chamber recommends the subcommittee include in its recommendations to the full committee including: (1) maintaining the current Maryland School Performance Program, including the use of measures of school and school system effectiveness; (2) completing the process of establishing meaningful criterion based examinations as a condition for awarding a high school diploma; (3) and linking any increased funding to a competitive process that requires schools and school systems to present comprehensive plans for the use of any incremental funds, which demonstrate how the funds will be used to improve student learning outcomes and include interim, measurable goals for evaluation by a multi disciplinary team with reports back to the State School Board and the General Assembly on a regular basis. He urged the subcommittee to recommend a process of delivering funds to school systems that have to compete through an application process on the basis of improved outcomes.

Ms. Patricia Dennis spoke representing the Children and Adults with Attention Deficit Disorder. Ms. Dennis spoke to her concerns regarding the Maryland School Performance Assessment Program. She indicated that it has led to desperation among parents and teachers and administrators. She warned that valuable class time is being wasted teaching to the test. Ms. Dennis stated that MSPAP is not an effective tool for academic improvement and that there will be no accountability until the Maryland State Department of Education releases all the information regarding the MSPAP.

Ms. Naznin Adams represented the Parent Advocacy Network for Differentially Abled (PANDA). In Maryland, students with special needs are required to take the Maryland School Performance Assessment Program as well as other academic tests required of all public school students. PANDA does not see the regular education students succeeding as a result of the MSPAP or parent participation in MSPAP. Ms. Adams indicated that the MSPAP drives the educational

curriculum and does not teach students. It has been PANDA's experience that the role of the teacher is not that of an educator who guides our children toward learning experiences but rather a spectator who watches children invent their own solutions to problems they do not have the life experience to understand. MSPAP evaluates the performance of the administrators. PANDA believes that the MSPAP is not a program that improves education of students. It is a program that replaces sound education with social goals.

The following individuals who did not sign up were invited to provide testimony:

Dr. John Lee spoke as a concerned individual. He spoke of his concerns regarding schools that are poor performing because they have high teacher attrition, large numbers of Free and Reduced Price Meals students, and lack leadership. The Maryland School Performance Assessment Program presupposes that teachers are qualified and presupposes that leadership matters. In poor performing schools the most senior and capable teachers leave. When asked what he would do to keep teachers in poor performing schools he said it would be important to tie teacher salaries to the difficulty of the school.

Mr. Ken Johnson spoke on behalf of the Prince George's County Board of Education. He defended the county's use of the Milliken School model and disputed the State Superintendent's statement that the schools were not performing. He gave the subcommittee advice to allow the jurisdictions the flexibility to relax some of the regulations and to give educators freedom and flexibility to know what is best for their jurisdiction.

Mr. Doug Stegler representing the Family Protection Lobby. He spoke on behalf of the families that have called him to express concern regarding the Maryland School Performance Assessment Program. Parents are concerned that their students are not receiving appropriate instruction and even more concerned that they aren't able to determine student results based on the MSPAP. Parents want to know how their child is doing on a test more than anything else.

The meeting adjourned at 9:00 p.m.

**Subcommittee on Funding Equity**
**October 29, 1997 - Montgomery College, Germantown, MD**

## Enhanced Funding for Programs Targeting At-Risk Students

A majority of individuals testifying at the public hearing supported targeting additional funds for "at-risk" students. For example, county executives from Howard, Montgomery, and Prince George's counties supported Dr. Grasmick's funding proposals. However, while there was overall consensus that the State was not doing enough to fund programs for "at-risk" students, there was not consensus in how the State should go about providing the additional funds. Some individuals believed a local wealth factor should be included; whereas other did not. For example, the President of the Prince George's County Board of Education supported additional funding for at-risk programs but did not consider equal per pupil funding for all school districts as equitable, since some school districts have a larger tax base and can fund school programs at a higher level than others. The President of the Montgomery County Alliance for Education Excellence recommended that the task force make education funding formula changes that will distribute resources equitably to local jurisdictions across the State. The distribution should be based on need, including growing enrollments and the number of children living in poverty, number of students who speak languages other than English and special needs.

In addition, some individuals supported additional funding for at-risk programs; but felt the task force should recommend increased funding for other programs as well. The President of the Montgomery County Council, while supporting the additional funding for limited English proficiency students, recommended that the State restore funding that was cut from the student transportation program in 1992. The Vice-President of the Montgomery County Board of Education, also agreed that the State should restore funding to the student transportation program. In addition, the Vice-President believed that the State should bear the full responsibility for nonpublic special education costs after the local school district makes its 300 percent contribution and restore State funding of social security payments for public school teachers.

## Comprehensive Approach to Education Funding

A few individuals testifying at the public hearing thought that the task force should take a more comprehensive review of education funding formulas, instead of relying on specific add-on programs. Many of these individuals contended that specific categorical programs only benefitted the larger political subdivisions that had the most votes. The Executive Director of the Maryland Education Coalition (MEC) stated that statewide funding increases should be distributed through the APEX formula by moving the State from 75 percent of the basic costs of education to 100 percent, in that this approach would take politics out of education funding. In addition, the Executive Director of MEC stated that "when moneys are spent in grants to one jurisdiction or another, the larger counties with more votes stand to get the lion's share of funding, whether or not they are in need of such funds. A statewide formula, such as APEX, thoughtfully addresses the needs of the entire State."

One citizen testifying at the hearing believed that the State is continuing to inadequately address the needs of its students, and that Dr. Grasmick's proposal will not deal with the problems facing "at-risk" students on any rational "whole" basis. According to this individual, the current proposals do not address funding equity, since several components are not based on local wealth. This individual contended that "to deal with the funding inequities in Maryland, you must start with determining students' needs and then have the locals and State share, relative to wealth, in funding 100 percent of the average or median costs. Special program decisions too often satisfy primarily political needs and are not distributed equitably.

## Other Initiatives Supported at the Public Hearing

Other comments made at the public hearing included the following:

- The Chairman of the Montgomery County Chamber of Commerce contended that existing education funding formulas are no longer sufficient to fund education programs, therefore the task force should re-examine all existing funding programs.

- Representatives at the Bethesda-Chevy Chase Cluster Schools proposed that the task force mandate all-day kindergarten for all school districts and to set a system-wide class size of under 20 students per teacher. Further, they recommended that the State allow counties more flexibility in charging students fees for busing and that the State should increase the percentage of money given to jurisdictions for transporting children with special needs.

- Representatives of the Calverton Elementary PTA in Prince George's County raised concerns regarding the education of regular students. They contended that there is a "pronounced disparity" in funding among comprehensive schools (schools that serve regular students). Further, they stated that the needs of over 75 percent of the students are not being met by the county school system.

- Representatives with the Montgomery County Education Association stated that the task force should reduce class sizes in that "at-risk" students suffer disproportionately in larger classrooms. They contended that teachers are more likely to fail to meet the needs of the hard to reach kids with large classes. Further, the association noted that teacher development programs have been greatly curtailed in recent years and this has posed a tremendous problem in reaching students.

- The Black Ministers Conference of Montgomery County proposed that the task force explore strategies for maximizing the effectiveness of any additional State funding by building incentives for school systems to enlarge the number of professionals whose training is in enlarging student competence.

**Subcommittee on Partnerships**
**October 30, 1997 - Baltimore City Community College, Baltimore, MD**

Mr. Shulman called the meeting to order at approximately 7:20 p.m. Other members present were Delegates Sheila Hixson and Kenneth Holt, Ms. Lisa Jackson, Mr. Sean Looney, and Mr. Barry Campbell. Staff present were Crystal Banks Martin and Julie Weinberg of the Department of Legislative Services.

The Chairman opened the public hearing by requesting that speakers address activities or practices that impede the creation of partnerships. Mr. Shulman also explained the mission of the task force and the goals of the subcommittee.

Mr. Les Ransom from the Maryland Economic Development Commission reviewed the recent findings of a survey on the State's workforce needs by the Maryland Business Research Partnership. The results of the survey support the important role of partnerships and highlighted the need to expose students to divergent career paths. Nearly 80 percent of firms contacted for the survey reported either "some" or "a great deal" of difficulty finding skilled workers for the high performance workplace.

Ms. Sally Scott Marietta, the Executive Director of the Maryland Economic Development Commission, emphasized the need for businesses to work with schools to develop work-based learning opportunities. She also expressed support for the Maryland School Performance Program and the Governor's scholarship proposals. In her concluding remarks, Ms. Marietta recommended that schools should include a business partner on school improvement teams.

Dr. Peggy Siegal, the Director of Business/Education Leadership Initiatives at the National Alliance of Business, identified the Maryland Business Roundtable for Education and the Corporate Partnership on Managerial Excellence as two exemplary public/private partnerships in Maryland. She noted that high impact partnerships need to become a critical strategy in sustaining business support for public education and creating a meaningful accountability system that reinforces local self-determination and student success. Dr. Siegal also explained eight characteristics of high impact partnerships that could be used for benchmarking.

Mr. Brian Porter, in the Office of the Superintendent for the Montgomery County Public Schools, explained that businesses can offer schools more in terms of management assistance than with curricula reform. Mr. Porter testified that the Corporate Partnership for Managerial Excellence (CPME) resulted in more than 125 recommendations to improve the administrative functions in 11 administrative areas. He also stated that there are many other successful partnerships with Montgomery County Public Schools, but none of the magnitude of the CPME.

Lt. Colonel Robert Nugent, Commander of the Baltimore Recruiting Battalion, Department of the Army, testified that the armed services are having a difficult time recruiting qualified young

people. According to LTC Nugent, the United States Army Recruiting Command is working with Suitland High School in Prince George's County and the Anne Arundel County Public Schools to provide students with guidance to make sound career choices after graduation. On October 28, the Baltimore Recruiting Battalion and MSDE entered into an agreement to improve the quality of learning in Maryland.

Dr. Yvette Marian with the Christiana Foundation explained her organization's mission to train the disadvantaged and "at-risk" on donated computer equipment. She also endorsed a systems approach to align the successful components of partnerships.

Ms. Katharine Oliver, Assistant State Superintendent for Career Technology and Adult Learning at MSDE, identified barriers to expanding partnerships. Currently, the Workers' Compensation Law does not cover students in unpaid learning experiences which prevents certain job shadowing opportunities. Dr. Oliver stated that the Department intends to have legislation introduced during the 1998 Session that will correct this problem. Dr. Oliver also encouraged the creation of financial incentives to help underwrite the costs of training.

Ms. Darla Strouse, Director of Partnerships with MSDE, testified that Maryland is a national leader in developing public/private partnerships. She identified several recommendations for sustaining and creating success partnerships. Ms. Strouse explained the need to have a full-time or half-time partnership professional on staff in each school district to leverage resources and expertise from the private-sector. In addition, Ms. Strouse endorsed a models approach for replicating partnerships and establishing benchmarks.

Mr. French Caldwell, a Montgomery County resident, testified that he participated in several partnership programs with schools during his naval career. He also encouraged the development of partnerships to create "schools of the future".

Mr. Gene Kijowski with the Montgomery County Workforce Development Board expressed support for tax incentives for workplace mentors. He also recommended as an accountability measure that MSDE track the students after graduation.

Ms. June Streckfus with the Maryland Business Roundtable for Education testified that businesses can define and communicate the needs of the workforce. She also reviewed several of MBRT's programs that serve the educational process including the development of the statewide technology plan, the implementation of a corporate training partnership, and the production of a partnership handbook.

Mr. Jim Kittler with the Montgomery County Construction Trades Foundation testified that changing demographics is causing a crisis with regard to finding trained workers. He also expressed his opinion that current graduation requirements prohibit students from enrolling in vocational courses and that vocational trades should not be ignored. He also testified that enrollments in the vocational trades are declining.

Mr. Champe McCulloch, Executive Director of the Maryland Chamber of Commerce, testified in support of financial incentives such as tax credits that would help cover the cost of training students. Mr. McCulloch also testified that meaningful partnerships are those that impact curricula and career choices.

The public hearing on public/private partnerships adjourned at approximately 9:30 p.m.

**Full Task Force**
**December 9, 1997 - Joint Hearing Room, Annapolis, MD**

On Tuesday, December 9th, the Task Force On Education Funding Equity, Accountability, and Partnerships held a public hearing in Annapolis. The meeting began at 7:15 p.m. and ended at 9:30 p.m. Twenty-seven people provided testimony in response to the task force's draft preliminary report released December 3, 1997.

The public testimony in general was very supportive of the work done by the full task force and the recommendations made in the areas of funding, accountability, and partnerships. Testimony was provided by public officials, public interest groups, parents, and citizens from around Maryland. Some testimony provided additional recommendations for future study or encouraged the task force to change specific recommendations. Many residents and stakeholders from Prince George's County provided testimony regarding the need for additional support for the Prince George's County Public Schools. Additionally, concern was expressed regarding the lack of public school construction recommendations and the disagreement with the recommendation to redirect the funding for the Prince George's County magnet schools to create an effective school program in Prince George's County.

The meeting began with comments from the task force chairman, Mr. Gene Counihan, regarding the evenings proceedings. Chairman Counihan referenced a letter received by the task force members from County Executives of seven jurisdictions, Anne Arundel, Baltimore, Baltimore City, Harford, Howard, Montgomery, and Prince George's in which they expressed their support of the proposal for statewide funding for children-at-risk made by the Maryland State Department of Education (MSDE) and the additional funding proposed for the Aging Schools Program. Chairman Counihan mentioned that the task force would hear from representatives of the seven jurisdictions first.

Representatives from four of the seven jurisdictions testified in support of the inclusion of these recommendations in the preliminary draft report. Those who testified included: County Executive of Baltimore County, Dutch Ruppersberger; President of Baltimore County Public Schools Board, Dunbar Brooks, Diane Hutchins representing the County Executive of Anne Arundel County, John Gary; Leonard Lucchi representing the County Executive of Prince George's County, Wayne Curry; and Rich Madeleno representing the County Executive of Montgomery County, Douglas Duncan. The representatives commended the task force on the statewide approach of providing funding for children at-risk and attaching strong accountability measures as part of the recommendations. County Executive Ruppersberger indicated his desire to see the Aging Schools program established through legislation, as well as, expressed gratitude for the positive endorsement that the task force has provided to the Baltimore County Mentoring program. Testimony on behalf of County Executive Wayne Curry indicated his support of the recommendations regarding specific additional operating aid for Prince George's County Public Schools.

Chairman Counihan, before moving on to additional testimony, thanked the representatives of the jurisdictions and mentioned that their support would be helpful during the 1998 legislative session. County Executive Ruppersberger added that even though the letter represented the support of only seven jurisdictions, this was a statewide approach to funding children at-risk, which benefits all jurisdictions.

Additionally, the task force members heard testimony from Beatrice Gordon, on behalf of the Montgomery County Board of Education and Marilyn Praisner of the Montgomery County Council. Both indicated their support for the statewide approach to funding children at-risk. Ms. Gordon expressed concerns regarding the non-supplantation language and encouraged the task force to provide the maximum amount of flexibility to schools to allow them to serve the at-risk populations. Ms. Gordon expressed her concern that special education costs were not addressed by the task force. Ms. Praisner additionally indicated her strong support for the partnership recommendations made by the task force. She recommended that the task force seriously consider, for the 1998 interim, issues surrounding the escalating costs of special education, the funding of student transportation, and the issues surrounding the challenges of high mobility rates in the schools.

Additionally, the task force members heard testimony from the Maryland Education Coalition expressing concern that the additional funding the task force was recommending would only be a stop gap measures and that the current system, including the APEX formula, need to be reviewed and revised. The Committee for Montgomery, Montgomery County Council of PTAs, Montgomery County Alliance for Educational Excellence, Inc., Montgomery County Chamber of Commerce, and the Network for children provided joint testimony indicating support for the preliminary report ensuring that additional needs-based State education spending will be predictable, stable and most importantly, equitable. Additionally, they urged the task force to consider equity issues around transportation and special education in the future. The groups urged that all members of the task force actively support the recommendations during session.

The remainder of the testimony was provided by residents, parents, and various stakeholders in the Prince George's County Public School System (PGCPS) including, the Suburban Maryland Building Industry Association and the Prince George's County Chamber of Commerce. In general, the testimony supported the needs of PGCPS for additional State funding and disagreement with the recommendation to redirect magnet school funding to a new effective schools program. There was general support for the neighborhood schools concept and the desire for the public school construction recommendations to address the needs of the Prince George's system. Chairman Counihan clarified some of the testimony that mentioned the dismantling of the elected school board and noted that the task force had not made any recommendations regarding the status of the PGCPS elected school board. Additionally, Mark Woodard speaking on behalf of Superintendent of PGCPS, Jerome Clark, indicated Dr. Clark's willingness to work in concert with the State Superintendent regarding the management audit recommendation. Overall, the parents representing PGCPS students were urging the task force to provide the resources necessary to meet the needs of their school system.

**Full Task Force**
**December 11, 1997 - Maple Elementary School, Cambridge, MD**

The task force held a public hearing on December 11 at Maple Elementary School in Cambridge, Maryland.

Following opening remarks by Chairman Gene Counihan, Senator Richard Colburn addressed the task force. Senator Colburn expressed his support of an equitable distribution of education aid to meet the educational needs of "at-risk" children around the State. He concluded that a revised school aid formula should be the only tool used to help all children in every jurisdiction.

School superintendents from five Eastern Shore counties participated in the public hearing. Dr. Terry Scout, President of the Maryland Association of Boards of Education, expressed his support of accountability efforts leading to improved student performance. Dr. Scout also urged that funding for school construction be awarded on an equitable basis. Dr. Jon Andes, Superintendent of Worcester County Public Schools, recommended that the Task Force use a fixed dollar amount for each identified at-risk child as opposed to a formula based upon local wealth.

Dr. Lorraine Costella, Superintendent of Kent County Public Schools, spoke in support of the Targeted Improvement Program. Dr. Costella also noted that limiting the numbers of allowable provisional certificates may cause hardships for smaller counties in meeting staffing needs. Dr. Spicer Bell, Superintendent of Dorchester County Public Schools, was also supportive of the new grant program for at-risk students. He recommended that local education agencies be given greater flexibility to use these funds in order to provide needed services to students at the middle and high school levels who may not self-identify themselves through the free and reduced price meals program.

Dr. R. Allan Gorsuch, Superintendent of Caroline County Public Schools, spoke on the need to increase education funding to counties based on the the number of children receiving free and reduced price meals and local wealth. Dr. Gorsuch recommended that the task force examine wealth per child as the basis for allocating funding to local education systems. Dr. Terrence Greenwood, Executive Director of the Public Schools Superintendents of Maryland, spoke in support of all of the task force's recommendations.

Mr. William Cain, Director of Administration of Somerset County Public Schools, spoke in support of the proposed Targeted Improvement Program as a means to help students that need the most help. Ms. Terry Ennis, a second grade teacher in Somerset County, expressed a need for more professional development and in-service programs to train educators to work with at-risk students. Ms. Meme Wells, President of Worcester County Teacher Association, also recommended that funding be awarded to local education agencies to train members of school improvement teams.

The meeting, which began at 7:15 p.m., concluded at 8:35 p.m.

# Critical Issues and Recommendations

## Introduction

The task force received the charge to review the State's education funding formulas and programs to ensure that they provide adequate resources to local school systems and to determine whether funds are distributed equitably across school districts. In addition, the task force was asked to determine whether programs for special needs students receive adequate resources. In the area of school accountability, the task force reviewed the State's existing school accountability systems and studied approaches to make school systems and school leaders accountable to both educational and fiscal standards. Finally, the task force reviewed ways in which public/private partnerships and individual or community efforts currently operate in the State to improve educational management and to support classrooms and students.

In its deliberations, the task force determined that additional State funding is needed to fill the gaps in programs serving "at-risk" students. Furthermore, enhancements to the State's existing education accountability systems are needed to ensure that funds are spent properly and effectively. Finally, the task force believed that existing public/private education partnerships could be expanded throughout the State, thus providing new resources to assist in both the managerial and instructional arenas. The following provides an in-depth discussion of the task force's recommendations.

## Enhanced Funding for At-Risk Students

### Background

Nearly one million students attend public schools across Maryland, with a large portion of these students being "at-risk" of not performing at a high academic level. Conceptually, "at-risk" students can be defined as those students who, while not necessarily poor, face significant obstacles to achieving academic success. This includes students coming from low income families and possessing limited English proficiency skills. Other factors may include attending schools that have a large proportion of inexperienced teachers or being from highly mobile families which move several times during a school year.

Approximately 32 percent of students enrolled in public schools in Maryland receive free and reduced price meals (FRPM), one of the best indicators of students "at-risk" of performing poorly in school. Further, in the last five years, the number of students receiving free and reduced price meals has increased by over 35 percent; whereas student enrollment has increased by only 12 percent. In addition, during this same period, the number of limited English proficient students (LEP) has increased by over 31 percent. These two indicators clearly show that a greater proportion of Maryland's student population is "at-risk" of not performing at a high standard. **Exhibit 1** shows the growth in the statewide "at-risk" population since 1990.

The free and reduced price meal (FRPM) count is based on the actual number of students participating in the federal school breakfast and lunch program. Program eligibility is determined by household income, with children being eligible for free meals if their household income is below

130 percent of the federal income poverty level. Children are eligible for reduced price meals if their household income do not exceed 185 percent of the federal income poverty level. The limited English proficiency count measures the number of students who speak English as a secondary language. This includes students born outside of the United States or whose native language is not English; students who come from an environment where a language other than English is dominant; and American Indian or Alaskan native students who come from an environment where a language other than English has had a significant impact on their level of English proficiency.

The academic performance of "at-risk" students has become evident through analyzing the results of the *Maryland School Performance Report*. Since 1993, overall student performance on the State functional tests has increased, with student attendance rates increasing and dropout rates decreasing. Further, more school systems had 40 percent or more of students at the satisfactory level on the Maryland School Performance Assessment Program (MSPAP) in 1996 than in 1993. However, while many students are performing at a higher level, a large number of students are still a considerable distance from meeting Maryland's academic performance standards. According to a report from the Maryland State Department of Education (MSDE), a majority of these students are from poor families (especially African-American and Hispanic males), are limited English proficient, or are from families that are highly mobile. While the State has historically provided significant amounts of funding for programs serving "at-risk" students, there still remain groups of students who need additional assistance to achieve the State's high academic standards. This is especially true of students who receive Title 1 and other compensatory education services in the elementary grades, but are not provided the supplemental support when they graduate to middle and high school. This concern forms the basis for the task force's recommendations.

**Exhibit 1**
**Student Enrollment Growth Rates**

| Fiscal Year | Total Enrollment* | % Change | FRPM Count | % Change | LEP Count | % Change |
|---|---|---|---|---|---|---|
| 1990-91 | 686,568 | 1.3% | 161,856 | 4.9% | 12,257 | 22.2% |
| 1991-92 | 700,816 | 2.1% | 187,151 | 15.6% | 11,764 | -4.0% |
| 1992-93 | 720,671 | 2.8% | 206,122 | 10.1% | 12,076 | 2.7% |
| 1993-94 | 735,769 | 2.1% | 227,942 | 10.6% | 13,951 | 15.5% |
| 1994-95 | 753,379 | 2.4% | 239,938 | 5.3% | 14,305 | 2.5% |
| 1995-96 | 772,104 | 2.5% | 249,469 | 4.0% | 15,104 | 5.6% |
| 1996-97 | 786,452 | 1.9% | 253,010 | 1.4% | 15,475** | 2.5% |

*Does not include pre-kindergarten students
**Estimated

### Existing State Funding for At-Risk Programs

The State currently provides local school districts with over $200 million in funding for programs serving "at-risk" students. These programs range from the federal Title 1 program which serves over 66,000 students at a cost of $97.5 million to the education of homeless children program which serves approximately 2,000 children at a cost of $262,500. While a considerable amount of funding is targeted to "at-risk" students, funding gaps still exist throughout the State, thereby creating obstacles for many children to perform at their highest potential. To address this concern, the Maryland State Department of Education (MSDE) developed a proposal, entitled the Targeted Improvement Program, that could reduce or eliminate existing funding gaps. This proposal includes: (1) providing additional targeted poverty and limited English proficiency grants to local school districts; (2) establishing a teacher development program; and (3) enhancing the current extended elementary education program.

**Recommendation: The task force recognizes that in many cases, students face multiple obstacles that impede their ability to perform at a high level. To address these multifaceted concerns, the task force supports the Maryland State Department of Education's comprehensive approach to providing additional funding for "at-risk" programs and recommends that the State implement these proposals during the next legislative session. An in-depth description of these funding proposals is provided in the following paragraphs and summarized in Exhibit 2 and Appendix 2.**

### Targeted Improvement Grants

In 1993, the Governor's Commission on School Funding found that the single best predictor of school performance is the percentage of students approved for free or reduced price meals. To address this problem, the State enacted a targeted poverty program during the 1994 legislative session. Since fiscal 1995, the State has provided funding to local school districts based on the number of students who qualify for free or reduced price meals. The fiscal 1998 State budget includes $26.2 million in targeted poverty grants, of which $18.2 million is new money added during the 1997 legislative session as part of the Baltimore City School legislation. Of the $26.2 million, $8 million is distributed to all school systems based on the county's proportionate share of the total number of children qualifying for free or reduced price meals; $16.6 million is distributed in the same manner to all school systems, except Baltimore City; and $1.6 million is targeted to school systems with over 40 percent of their students eligible for free/reduced price meals, excluding Baltimore City. While the current targeted poverty program enables school districts to provide extra services in order for "at-risk" students to overcome potential barriers for educational attainment; this approach fails to account for different local abilities to fund programs for "at-risk" students.

Targeted improvement grant funding is based on 85 percent of the number of children eligible for free and reduced price meals multiplied by 2.5 percent of the per pupil foundation under the basic current expense program. Each county's initial allocation is adjusted by a factor relating each county's wealth per full time equivalent student to the statewide wealth per student. Finally, Baltimore City receives 50 percent of its formula allocation. Basing the per student grant amount on a percentage of the basic current expense formula's foundation will account for increases in educational costs; thus reducing the need for periodically adjusting the per student grant amount for inflation. This new program will address current funding gaps for "at-risk" services, while providing greater assistance to local school districts that have fewer financial resources available to close these funding gaps on their own. The targeted improvement program grant will cost approximately $16.3 million in fiscal 1999 (see **Exhibit 2**).

**Recommendation: The task force endorses MSDE's recommendation to establish a new categorical grant program for students living in poverty based on the number of students receiving free and reduced price meals and local wealth. The task force concurs with the wealth neutralization component in the targeted improvement grant, which will provide relatively more State assistance to local school districts with fewer financial resources, thus reducing the "gap" in spending across the State.**

**The task force also recommends that the targeted improvement grant funding be used to provide supplemental funds to schools or specific structured after school or summer activities that have 25 percent or more of the student population on free and reduced price meals. Local school systems should have the flexibility to distribute funds to these priority areas based on their local comprehensive plans to increase the performance of children at risk.**

### Limited English Proficiency Grants

Students with limited English proficiency (LEP) face considerable obstacles in obtaining a high level education absent specialized instructional services. Montgomery County, which serves around one-half of the State's LEP students, currently spends an additional $2,200 per LEP student. In recognition of the State's responsibility for educating students with limited English proficiency, the State currently provides local school districts with grants totaling $500 per LEP student or around $6 million. This funding, however, represents only a fraction of the real cost to educate these students.

Under current law, local school districts may only include students in the LEP count for two school years. Based on fiscal 1999 projections, there are 15,475 LEP students in the State, with 12,090 receiving services for less than two years. Accordingly, the State provides no funding for approximately 22 percent of students identified as having limited English proficiency through the statutory formula. During the 1997 legislative session, the State provided local school districts with $1.9 million in fiscal 1998, as part of the Baltimore City School legislation, (SB 795), to cover expenses for LEP students affected by the two-year restriction.

**Recommendation: The task force believes that the State must do more to assist local school systems in funding programs for students with limited English proficiency. Further, the task force finds that students may require more than two years of specialized instruction in order to become proficient in English; and without obtaining English proficiency, students will not be able to meet their educational potential. Therefore, the task force recommends that the State increase the current LEP grant from $500 to $1,350 per LEP student and repeal the current two-year restriction on students receiving LEP funding.** The limited English proficiency grant proposal will cost approximately $15.3 million in fiscal 1999 (see **Exhibit 2**).

**Professional Development Programs**

A major problem facing "at-risk" students is that they are more likely to attend schools with less experienced teachers. These teachers often require additional mentoring and support to adapt to the requirements and challenges of the teaching environment in schools that serve a large proportion of "at-risk" students. Further, without the proper instructional support, these students will not be able to keep up with their peers. Therefore, enhancing teacher development and support services in schools that serve a large proportion of "at-risk" students is a major priority of this task force.

MSDE's TIP proposal includes establishing a statewide teacher development program in schools with a free or reduced price meal count of 25 percent or more of their student population. Each eligible school will receive an $8,000 grant to enhance teacher development in a school with a high at-risk student population. In addition, Baltimore County will receive an additional $5 million to enhance its successful teacher mentoring program for a pilot program to determine best practices of teacher mentoring efforts. The Baltimore County program provides enhanced mentoring efforts for teachers working with at-risk students and addresses issues of teacher retention in schools with a high at-risk student population.

**Recommendation: The task force endorses MSDE's proposal for a $5.5 million statewide teacher development program in schools with a high at-risk student population in order to provide particular assistance to teachers in dealing with at-risk students. It also endorses a $5 million enhancement of the Baltimore County Teacher Mentoring Program to be developed and evaluated as a potential model to identify best teacher mentoring practices for use by other jurisdictions in the State.** The teacher development program will cost approximately $10.5 million in fiscal 1999 (see **Exhibit 2**).

As with teacher development programs, research has shown that properly trained school-based administrators can have a profound impact on the operation and performance of local schools. Currently, MSDE provides a limited array of professional development programs for local school-based administrators, however, most of these programs are being provided by institutions of higher education at the individual's expense. Further, several of the professional development programs

provided by MSDE are tailored primarily for teachers, such as the Regional Staff Development Networks.

The task force believes that these programs are not sufficient in dealing with the complex issues affecting our public schools, especially schools serving a large proportion of "at-risk" students. Furthermore, in recent years, funding for professional development programs for school-based administrators and principals have been curtailed due to budget containment efforts at both the State and local level. For example, the Maryland Professional Development Academy for Administrators was discontinued in 1991 due to reduced funding. It was not until 1997, when MSDE received additional federal funding, that the department was able to offer the Principals Academy for Science, Mathematics, and Technology to support administrators' understanding of the Maryland State Performance Assessment Program and the High School Improvement Program.

**Recommendation: In recognizing the unique and important role that school-based administrators and principals have in the effective operation of local schools, the task force recommends that the Maryland State Department of Education and local school systems expand existing professional development programs for school-based administrators and principals and develop new programs that would assist these individuals in dealing with "at-risk" students. In addition, the Governor should including funding for these programs in the State's budget each year.**

### Extended Elementary Education Program

The extended elementary education program supports public school prekindergarten for four-year old children who live in Title 1 eligible school attendance areas. The program is based on the theory that early intervention: (1) increases students' opportunity to realize their educational potential; and (2) reduces future educational and societal costs. The fiscal 1998 State budget includes $14.9 million in funding for 249 sites: $11.6 million will be used for 204.5 existing elementary sites with an average grant of $57,000 per site and $3.3 million will support another 44.5 sites at $70,000 per site. The task force believes that extending this program to additional eligible "at-risk" children will better prepare these students for school thus improving student performance in future grades.

**Recommendation: The task force recommends an additional $4.4 million in funding for the Extended Elementary Education Program (EEEP). This would establish 24 additional sites statewide, increase funding for 204.5 existing sites to a level of $65,000 per site, and provide $1 million in competitive grants to local school districts.** This extended elementary program enhancement will cost $4.4 million in fiscal 1999 (see **Exhibit 2**).

**Targeted Improvement Program Must Include Accountability Measures**

The fifth component of the Targeted Improvement Program addresses the need for accountability to accompany the additional resources provided under TIP for local jurisdictions. MSDE proposes that local school systems receiving TIP money would be responsible for submitting a comprehensive plan to increase the performance of children at risk based on MSDE criteria for measuring student success. The consolidated plan would include funding for Title I, Targeted Poverty, State Dedicated Compensatory Education, the Extended Elementary Education Program, and Grants for Limited English Proficient Students. The plan must integrate funding from State, federal, and local programs targeting children at risk.

School systems would be required to submit semi-annual and annual progress reports to MSDE containing information on program implementation and the resulting outcomes. Local school systems would include in their consolidated comprehensive education plans a listing of the schools that would receive the funds and a description of the processes and measures the school system would use to evaluate the effect of TIP on improved student performance. MSDE would evaluate the efficacy of programs for students at risk.

Additionally, the TIP proposal highlighted the need for the Maryland State Department of Education to receive additional funds for statewide monitoring and implementation of school improvement. This would enhance the department's data collection capabilities and ability to provide meaningful analysis to guide school improvement.

**Recommendation: The task force strongly supports the accountability framework provided for in the Targeted Improvement Program (TIP). The task force believes that each school system must have a description of the measures that will be used and the process by which data will be collected and evaluated to measure change in student learning and other educational performance attributable to the TIP project**. In addition, all school systems should be required to submit to the department semi-annual and annual progress reports that include specific data about the nature and extent of changes in student learning for students participating in TIP. This information should be used to modify and/or enhance strategies that are having a measurable impact on the performance of students.

**The task force also recommends that additional resources be provided to MSDE to ensure the accountability of the additional TIP funds being provided to local jurisdictions. The Governor should provide $4.0 million in the fiscal 1999 and $2.7 million in the fiscal 2000 budgets and an additional $820,000 for recurring expenses for the Maryland State Department of Education for additional personnel and an information management system. Exhibit 3** identifies the additional funding required to fully fund an enhanced information system and the additional personnel costs related to monitoring and evaluating the programs. The additional funds will enable the department to overcome limitations of the current school performance information management systems and to fulfill its accountability role in the Targeted Improvement Program (TIP). The task force strongly believes that the weaknesses in information management systems are not consistent with obtaining accountability for program achievements.

**Codify Targeted Improvement Program**

**The task force recommends that the Targeted Improvement Program be introduced as legislation in the 1998 legislative session, and that it sunset in four years**. This would provide additional funding for "at-risk" programs through fiscal 2002, which is the same time period for the funding commitments of the Baltimore City School legislation (SB 795). This program will be a $46.5 million funding increase in fiscal 1999.

**Maintenance of Effort Provision**

**The task force recommends that a maintenance of effort and nonsupplantation provision be included in any legislation providing additional targeted aid to local school districts.** Such a provision should provide for flexibility by local education agencies while ensuring that additional State aid aimed at closing the funding gaps for "at-risk" programs is not used to divert funding to other programs.

**The task force feels strongly that targeted education funds provided by the State should not be used by local governments to supplant local education funding for programs targeted by the State for enhancement. To the extent that a local education agency (LEA) achieves the intended funding level in a particular targeted program, the LEA may be allowed to divert local funds to other targeted programs if identified in the LEA's Targeted Improvement Program comprehensive plan and approved by the Maryland State Department of Education.**

**Exhibit 2**

## Targeted Improvement Program

**Fiscal 1999 Funding Levels**

| County | TIG | LEP | EEEP | Teacher Development | Total Allocation |
|---|---|---|---|---|---|
| Allegany | $528,766 | $4,250 | $57,541 | $192,000 | $782,557 |
| Anne Arundel | 613,020 | 439,150 | 200,241 | 232,000 | 1,484,411 |
| Baltimore City | 4,328,217 | 511,350 | 694,491 | 1,392,000 | 6,926,058 |
| Baltimore | 1,517,801 | 1,197,800 | 100,759 | 5,584,000 | 8,400,360 |
| Calvert | 131,928 | 15,300 | 143,029 | 8,000 | 298,257 |
| Caroline | 268,570 | 61,700 | 51,770 | 64,000 | 446,040 |
| Carroll | 188,470 | 67,900 | 14,270 | 48,000 | 318,640 |
| Cecil | 286,108 | 30,200 | 162,011 | 80,000 | 558,319 |
| Charles | 352,523 | 71,600 | 144,439 | 96,000 | 664,562 |
| Dorchester | 205,025 | 32,400 | 70,036 | 72,000 | 379,461 |
| Frederick | 359,543 | 126,900 | 180,082 | 80,000 | 746,525 |
| Garrett | 187,450 | 0 | 36,312 | 120,000 | 343,762 |
| Harford | 502,561 | 135,900 | 174,311 | 128,000 | 940,772 |
| Howard | 203,756 | 810,850 | 72,500 | 24,000 | 1,111,106 |
| Kent | 60,062 | 30,550 | 55,541 | 56,000 | 202,153 |
| Montgomery | 1,058,962 | 7,037,650 | 313,759 | 568,000 | 8,978,371 |
| Prince George's | 3,961,390 | 4,254,300 | 336,226 | 1,088,000 | 9,639,916 |
| Queen Anne's | 70,236 | 20,350 | 59,426 | 32,000 | 182,012 |
| St. Mary's | 283,822 | 59,800 | 261,134 | 96,000 | 700,756 |
| Somerset | 184,870 | 31,850 | 39,729 | 72,000 | 328,449 |
| Talbot | 44,239 | 28,950 | 20,541 | 48,000 | 141,730 |
| Washington | 464,220 | 153,650 | 103,416 | 200,000 | 921,286 |
| Wicomico | 429,573 | 166,650 | 22,541 | 128,000 | 746,764 |
| Worcester | 86,336 | 38,200 | 51,656 | 80,000 | 256,192 |
| Unallocated | | | 1,000,000 | | 1,000,000 |
| Total | $16,317,448 | $15,327,250 | $4,365,761 | $10,488,000 | $46,498,459 |

TIG = Targeted Improvement Grant
LEP = Limited English Proficiency Grant
EEEP = Extended Elementary Education Grant
*$2 million is budgeted under the Challenge School Program, thus the net cost to the State is $44,498,458.

Prepared by the Department of Legislative Services, January 1998

**Exhibit 3**
**Integrated Data System -- Estimated Fiscal Impact**

| | Information Management Budget Enhancements | | | Additional TIP Costs Assuming MIS Enhancement | |
|---|---|---|---|---|---|
| Category | FY 1999 Expenditures | FY 2000 Expenditures | Recurring Expenditures | FY 1999 Expenditures | Recurring Expenditures |
| Hardware | 720,463 | 479,537 | 130,305 | 5,000 | 1,000 |
| Software | 439,656 | 109,099 | 130,305 | 2,000 | 1,000 |
| Personnel and Contract Servs | 2,524,300 | 1,977,329 | 439,548 | 338,140 | 117,500 |
| Total | 3,684,419 | 2,565,965 | 700,158 | 345,140 | 119,500 |

**Total Costs of Both the Information Management System and the TIP Tracking System**

| Category | Total FY 1999 Expenditures | Total FY 2000 Expenditures | Total Recurring Expenditures |
|---|---|---|---|
| Hardware | 725,463 | 480,537 | 131,305 |
| Software | 441,656 | 110,099 | 131,305 |
| Personnel and Contract Servs | 2,862,440 | 2,094,829 | 557,048 |
| Total | 4,029,559 | 2,685,465 | 819,658 |

## Prince George's County Public Schools Proposals

### Background

The Prince George's County Public Schools (PGCPS) is the largest school system in the State, serving over 125,000 students this year. The county has the second highest concentration of minority students in the State, at 83 percent. Currently, PGCPS' student body is 73 percent African American, 17 percent white, and 10 percent other minorities including Hispanic, Asian, and American Indian. In addition, 41 percent of students in Prince George's County are approved for free and reduced priced meals, one of the best predictors of student performance. Since the beginning of the Maryland School Performance Assessment Program (MSPAP), Prince George's County Public Schools have consistently ranked near the bottom of Maryland's public school systems. In 1996, Prince George's County ranked 23rd in the State for its MSPAP scores, with only 30 percent of its students scoring at a satisfactory level.

In fiscal 1998, Prince George's County is receiving nearly $400 million in State education aid. This includes $331.7 million in direct aid and $64.7 million in teachers' retirement payments made on behalf of the county school system. Of the direct education aid, the State provides $14.1 million to fund the county's magnet schools program and $7.7 million in targeted poverty grants. The State provides 45 percent of total education funding in Prince George's County, with the county providing 52 percent and the federal government 3 percent.

A charter amendment imposed in 1978 and amended in 1984 limits the Prince George's County's general property tax rate to $2.40 for each $100 of assessed value. However, Prince George's County levies several special property taxes that are not affected by the tax limitation measure. In fiscal 1998 the total property tax rate is $3.23 per $100 assessed value, including special tax rates totaling $0.83 for non-general funded programs such as the county's park and recreation system. Even with the tax limitation measure, Prince George's County still experiences one of the highest local tax burdens in the State. In fiscal 1994, Prince George's County had the second highest tax effort in the State at 126% of the state average. Only Baltimore City had a higher tax effort. Tax effort compares the extent to which local governments tax available resources to fund all government services.

PGCPS has been under court order for 25 years to desegregate its schools. In contrast to the county's current racial composition, in 1972 the school population was 73.5 percent white and 24.9 percent African-American. This demographic shift over the last 25 years has made it difficult to achieve the court's desegregation goals. A trial began in federal district court on November 18, 1997, to consider motions to end or modify court-ordered desegregation remedies. The Prince George's County Board of Education developed a plan in 1994 to end court-ordered busing for desegregation purposes and has revised the plan this year. It is now called the Community Schools Education Plan. The plan calls for an investment of approximately $333 million in capital and $500 million in operating funds from Prince George's County and the State to address desegregation issues and enrollment growth. The Board of Education seeks to have the court order the State to contribute a portion of these funds as a desegregation remedy. During the summer of 1997, Governor Glendening announced his intention to provide $90 million to $250 million to Prince

George's County over a three- to five-year period to assist the county in ending court-ordered busing.

It is in this context that a series of meetings were held to explore issues surrounding the desegregation lawsuit and academic and management performance in the Prince George's County Public Schools. In a letter to Delegate Howard P. Rawlings in October, Governor Glendening reiterated that he is considering providing $90 million to $250 million for Prince George's County and looks forward to the task force's recommendations on the issue. In a separate letter to State Superintendent Grasmick, the Governor endorsed a set of principles Superintendent Grasmick had outlined to guide providing additional funds to Prince George's County. These principles, distributed to the task force, are:

- any school construction funding should go through the normal process of the Interagency Committee on School Construction;

- any additional operating funds for Prince George's County should be considered in a statewide perspective, consistent with the task force's charge to examine gaps in funding throughout the State; and

- strong accountability and management measures must accompany any additional funds provided to Prince George's County or any other jurisdiction.

**Desegregation Lawsuit**

The Prince George's County Public Schools has operated under court-ordered desegregation since 1972. The plaintiffs (*Vaughns, et al. v. Board of Education of Prince George's County, et al.),* a class of African-American school children in the PGCPS, are represented by the NAACP and the Lawyers' Committee for Civil Rights Under the Law. The defendants are the Prince George's County Board of Education and various PGCPS officials, and, upon its own initiative in 1996, the government of Prince George's County. The State is not a party to the case, having successfully opposed several motions by the defendants to enjoin the State as a defendant, most recently in 1997. However, the court's 1997 order leaves the plaintiffs and defendants the option of seeking to join the State as a party at a later date.

For the trial which began November 17, the Prince George's County Government filed a motion asking the court to declare PGCPS in "unitary status" and end all court supervision related to desegregation. The Prince George's County Board of Education filed a motion seeking "partial unitary status" and to modify existing court orders. The board seeks continuing court jurisdiction and, specifically, seeks an order from the court requiring the State and the county to provide the funding necessary to implement the board's desegregation plan. The Maryland Attorney General's Office advises that the court may impose programmatic and financial requirements on any of the defendants in the case. As the State is not a party in the case at this time, the court may not order the State to participate in a remedy.

**Recommendation: The task force is committed to the State's Constitutional obligation to provide a "thorough and efficient system of free public schools." This obligation exists in every jurisdiction independent of the outcome of any litigation. The task force is further committed to the academic achievement of all Maryland students. The task force believes its recommendations are consistent with these commitments.**

**Community Schools Education Plan**

The Prince George's County Board of Education has developed a Community Schools Education Plan (CSEP) to eliminate segregation in its schools. The plan proposes four major goals:

- Return the 11,400 involuntarily bused students to schools in their own communities and address the construction and operational needs required by the projected rapid growth in student population;

- Develop an educational program that would meet the needs of those students return to their community schools;

- Retain the current Magnet and Milliken desegregation programs; and

- Develop a rigorous accountability program.

The cost of the plan is $333 million in capital costs to build new schools in communities where schools have been closed and expand other schools to return students involuntarily bused to their communities and address enrollment growth issues. This component of the program will be discussed under school construction.

The operating component of the program is estimated to cost $500 million over eight years. The county proposes to retain its current magnet and Milliken II schools and establish an additional 29 Milliken II schools, with 20 students per class, and 62 model comprehensive elementary schools, which would have classes of no more than 25 students. Milliken II schools, named after a lawsuit involving former Michigan Governor Milliken, are schools with a high concentration of one race (more than 80 percent) which receive additional resources to compensate for the racial isolation of the school environment. The county began operating magnet and Milliken II schools after a 1985 agreement with the court and parties to the lawsuit. The county currently operates Milliken II programs in 21 schools and is spending $10.3 million on them in FY 1998. The Department of Legislative Services estimates that when fully phased in, the operating costs of 29 additional Milliken II schools will be up to $14 million annually. The State is currently providing $14.1 million for the county's 60 magnet school programs.

The task force asked MSDE to review the Prince George's County Board of Education's Community Schools Education Plan and make recommendations on its implementation. In particular, members were interested in the plan's expansion of Milliken II schools and emphasis on

small class sizes given the lack of consistent performance in these schools. MSDE reviewed the plan in terms of its proposals for increasing student achievement, improving the skills of the teacher workforce, and establishing accountability measures to test the program's effectiveness. MSDE found: "The plan fails in that it does not identify specific needs as determined by a comprehensive needs assessment, present a detailed plan of implementation and operation, nor propose any criteria to assess the effectiveness of the approach. Overall, it lacks effectiveness measures to ensure that the approaches combined with the substantial fund outlays will produce significant required improvements in student achievement." (MSDE November 5 Report to Subcommittee, page 6)

**Recommendation: The task force shares MSDE's concerns with the Prince George's County Board of Education's Community Schools Education Plan. Any plan calling for such significant investment must be based on a comprehensive approach and "best practices" methods to increase student achievement and must be accompanied by strong accountability measures and evaluation components.**

### Academic Performance of Prince George's County Public Schools

In reviewing the CSEP's recommendations to expand Milliken schools, MSDE evaluated the recent performance of the four major groups of schools in PGCPS: magnet, Milliken II, model comprehensive, and comprehensive (basic). Using performance as depicted by the School Performance Index (SPI), which is a measure of how far a school system is from achieving satisfactory standards in the Maryland School Performance Program, MSDE found that overall PGCPS elementary, middle, and high schools perform below the statewide median. The lowest performing schools are the elementary schools. When all the elementary schools in the State (excluding Baltimore City) are ranked in quartiles based on 1996 SPI data, nearly 70 percent (85 schools) of PGCPS elementary schools are in the bottom quartile. 1996 SPI data show that for elementary schools, the comprehensive, magnet, and model comprehensive schools only marginally exceeded the county average, while Milliken schools fell well below the average. For middle schools, only the magnet schools performed higher than the county average. All high schools are performing at a high level with Milliken schools slightly below the average.

MSDE noted that Prince George's County elementary schools have improved since 1993, consistent with improvement experienced on a statewide basis. However, taking a closer look at elementary schools, MSDE found that PGCPS schools started at a lower level of performance in 1993 and rose to a higher level of performance in 1996 than comparison schools with similar demographics (particularly eligibility for free and reduced price meals (FRPM) and African American enrollment). Of the 23 schools (or 28 percent) in PGCPS that improved each year or exceeded the State median in 1996, they utilized a variety of strategies and programs. No more than 50 percent of the schools using a particular strategy, like magnet or Milliken II programs, consistently improved. Overall, MSDE found that there is no data to show that the Milliken II schools lead to increased school achievement and the data on the model comprehensive schools also does not overwhelmingly support their expansion.

MSDE also reviewed the report of the expert panel appointed by Judge Messitte to examine and report on the status of desegregation in PGCPS. In its June 1997 report, the panel found that PGCPS had complied with court orders in most areas to the extent practicable, and where it may have failed to do so, that additional efforts would not have resulted in further desegregation of the school system. In discussing Milliken II schools the panel report noted, "if they have failed to mount an effective educational program they have failed as a remedy for segregation." (Panel Report, page 52) Ultimately the panel concluded that it could not determine the effectiveness of the use of resources for Milliken II schools because PGCPS has never provided clear expectations for the schools, identified appropriate outcomes, or evaluated the programs. The panel did find that Milliken II schools do less well than other elementary schools on MSPAP and that teachers at Milliken II schools have 15 percent less post-B.A. training that teachers at other schools. They also have 36 percent less experience teaching that schools with the lowest percentage of African-American students. For the magnet programs, the panel found they had some desegregative effect. However, as with Millikens, PGCPS has not established clear goals or evaluated the programs to determine their effectiveness.

In summary, MSDE found that:

- The level of student achievement in Prince George's County schools is unacceptable.
- The allocation of additional funding based on school demographics, by itself, does not increase student achievement.
- Some schools do improve student achievement through implementation of specific research-tested intervention strategies targeted for student academic gaps identified through a data-based needs assessment.

**MSDE Recommendations to Address Specific Needs in PGCPS**

MSDE made a series of recommendations related to identifying student academic gaps based on specific data, designing interventions based on research-proven strategies, creating a management system to support implementation of an improvement plan, and providing accountability for systemic reform.

**MSDE recommended that the $14.1 million the State provides annually to fund Prince George's County's magnet school program be redirected to magnet and other effective schools to support research-proven intervention strategies which enhance instruction and student performance based on results and have strong monitoring and evaluation components. An additional $2 million to support this effort is also recommended.**

**MSDE also recommends $1 million in new State funds for a pilot integrated student support services program in PGCPS.** These funds would enable the expansion of support services such as wellness services, tutoring, social work services, and mental health counseling to at-risk

children living in neighborhoods of poverty. Such a program should have a strong evaluation component and provide the State with a model which could be replicated on a statewide basis. The services will be coordinated with services provided by local management boards.

**To address teacher quality issues in Prince George's County MSDE has proposed two statewide initiatives, at a cost of $3 million, to assist provisional teachers in becoming fully certified and to meet the on-going instructional support needs of teachers with less than five years of classroom experience.** MSDE proposes a new program to assist provisional teachers in obtaining their standard professional certificate discussed further below under "Certification and Mentoring of Teachers." This program would initially focus on the needs of Prince George's County, where the crisis is greatest with nearly 13 percent (900) of its teacher workforce holding provisional certificates, some for as long as eight years (see **Exhibit 4**).

MSDE also recommends developing a teacher mentoring program in the PGCPS based on best teacher mentoring practices identified in the Baltimore County Teacher Mentor Program, and expanding the use of teacher mentor programs statewide. The Teacher Mentor Program is designed to assist teachers with less than five years teaching experience to improve student achievement and increase teacher satisfaction and retention.

**Recommendation: The task force endorses MSDE's recommendations to redirect existing State funding and provide new State funds for targeted programs to improve student achievement and teacher quality in the Prince George's County Schools. These additional funds should be provided to Prince George's County in fiscal 1999 and reviewed annually based on the county's compliance with accountability measures and an annual evaluation of the programs' effectiveness by MSDE.**

**Consistent with the task force's comprehensive and statewide approach, these programs are recommended as pilot programs in Prince George's County to be expanded to other jurisdictions if successful. The funding recommendations are summarized below, including Prince George's TIP allocation.**

**Exhibit 4**

**1996 - 1997 School Year**

Comparison of Provisional Teachers in Prince George's County with other Maryland Subdivisions

| Local School System | Number | % of Teachers |
|---|---|---|
| Allegany | 6 | 0.87 |
| Anne Arundel | 54 | 1.30 |
| Baltimore City | 440 | 7.00 |
| Baltimore County | 103 | 1.57 |
| Calvert | 10 | 1.35 |
| Caroline | 4 | 1.30 |
| Carroll | 16 | 1.11 |
| Cecil | 11 | 1.22 |
| Charles | 42 | 3.60 |
| Dorchester | 7 | 2.25 |
| Frederick | 38 | 1.84 |
| Garrett | 4 | 1.08 |
| Harford | 23 | 1.01 |
| Howard | 49 | 1.94 |
| Kent | 1 | 0.55 |
| Montgomery | 107 | 1.44 |
| **Prince George's** | **900** | **12.80** |
| Queen Anne's | 8 | 2.17 |
| St. Mary's | 28 | 3.24 |
| Somerset | 7 | 3.26 |
| Talbot | 7 | 2.58 |
| Washington | 11 | 0.89 |
| Wicomico | 8 | 0.80 |
| Worcester | 3 | 0.71 |

**Exhibit 5**

| | State Funding ($ in millions) | | |
|---|---|---|---|
| **Program** | **Current Funds** | **New Funds** | **Total Funds** |
| Magnet and Other Effective Schools | $14.1 (dedicated to magnet schools) | $2.0 | $16.1 |
| Pilot Integrated Student Support Services Project | 0 | 1.0 | 1.0 |
| Statewide Teacher Certification and Professional Development | 0 | 3.0 | 3.0 |
| Performance Audit of PGCPS | 0 | 0.2 | 0.2 |
| TIP | 0 | 9.6 | 9.6 |
| **Total** | **$14.1** | **$15.8** | **$29.9** |

**PGCPS Funding and Accountability**

There remain significant, unresolved issues between the Prince George's County Government and Board of Education concerning accountability measures relating to school funding, the funding and management of the county's school construction program, and resolution of the pending desegregation litigation. The task force recessed until January 6, 1998, to afford the county and board an opportunity to reach a proposed settlement on these issues.

As the opening of the 1998 session of the General Assembly approaches, a resolution of issues between the county executive and the board of education does not appear imminent. The county executive and board of education have each made proposals but no agreement has been reached. The county executive's proposal included the creation of an independent chief financial officer for the school system to oversee non-academic functions of the board, which could result in $10 million in savings if the county and the board eliminated duplicate administrative functions and pursued joint purchasing agreements. The county executive proposed dedicating these savings to enhancing classroom and academic functions and payment of debt service for an expanded school construction program. The board of education responded with a counterproposal which included a special committee to monitor school construction with members appointed by the board, county, and the State, but would have no formal power over the school system. The federal judge overseeing the litigation has announced in the absence of a settlement that no judicial decision will be forthcoming until June 1, 1998.

The board of education has made a substantial capital request to the State for FY 1999-2004. Based upon enrollment projections and the existing use of temporary classrooms, it is clear Prince George's County has significant school construction needs. However, the State cannot make any school funding commitments to the county in the absence of specific funding agreements between the county government and the board of education.

**Recommendation: The accountability issues which have been raised must be seen in the context of academic performance issues discussed by the State Superintendent before the task force, as well as the annual MSPAP test results in Prince George's County. The task force recommends that the General Assembly and Board of Public Works examine each of these issues carefully as part of any increased operating or capital funding commitments to the Prince George's County school system. The task force believes that funding and accountability issues cannot be separated, and that any new funding commitments to Prince George's County should be accompanied by appropriate accountability measures consistent with the State's constitutional obligation to provide a "thorough and efficient" education for every school-age child in the State.**

**PGCPS Audit**

To evaluate the current fiscal and management operations of PGCPS, MSDE recommended that a performance audit currently in the planning stage by the Prince George's County Government and Board of Education be submitted to the State Superintendent who, in consultation with the County and Board of Education, would review the audit and provide recommendations on implementation of the consultant's findings and/or identify other areas for further review. In addition, MSDE recommended that a comprehensive financial audit be undertaken by an independent certified public accounting firm. The scope of the audit would include a review of PGCPS' internal control structure and proper classification of expenditures. A report on the findings and recommendations for improved financial accountability would be submitted to the State Department of Education and the county board of education for comment and action.

**Recommendation: After reviewing MSDE's recommendations and testimony received from PGCPS Superintendent Clark, the task force recommends that the performance audit of PGCPS go forward. The State should share one-third (1/3) of the total cost of the audit with the county, not to exceed $200,000. The financial components recommended by MSDE should be added to the annual financial audit of PGCPS (required by State law for each LEA) conducted by an independent audit firm, and should include a review of the internal control structure and classification of expenditures.**

**Additionally, in order to provide for public input and confidence in the audit, the task force recommends the appointment of a "management oversight panel" composed of Prince George's County residents. The nine-member panel would be appointed jointly by the Governor, the Prince George's County Executive, and the Prince George's County Board of**

**Education Chairman from a list of qualified individuals submitted by the State Board of Education and the State Superintendent of Schools. The Governor, County Executive, and Board of Education Chairman shall jointly designate a chairman of the management oversight panel. If consensus cannot be reached, agreement on any appointment by two of the three parties is acceptable. The management oversight panel must be appointed no later than February 1, 1998. The State should not contribute its share of the audit's cost until the management oversight panel has been appointed. A consultant may be chosen and preliminary work may begin on the performance audit immediately, but the consultant should not proceed with work on the scope of the performance audit until meeting with the management oversight panel.**

**The panel would include four who have extensive expertise in management or business enterprises, three who have extensive expertise in the education field, and two parents of PGCPS students, at least one of whom has a child in special education. The panel would assist in developing the scope of the audit and would meet periodically with the consultant to monitor the progress of the audit. The panel, along with the county executive, board of education, and MSDE, would review the findings and recommendations of the audit, make comments to the appropriate bodies, including the Maryland General Assembly, the Prince George's County Executive and County Council, and the Prince George's County Board of Education, and monitor the implementation of the findings for a three-year period.**

## School Construction

The task force received several briefings on the State's Public School Construction Program and its various components. The Public School Construction Program(PSCP) was established by law in 1971 to: (1) provide local tax relief; (2) relieve the subdivisions of the high costs of school construction; (3) address the backlog of new construction, renovation, and replacement of schools; (4) even out the financial impact through the State assumption of these costs; and (5) equalize educational facilities and opportunities throughout the state. The Interagency Committee on School Construction (IAC) administers the Public School Construction Program(PSCP) under the rules and regulations adopted by the Board of Public Works. The IAC consists of the Superintendent of Schools, the Secretary of General Services, and the Director of Maryland Office of Planning. The Board of Public Works is the final authority on all matters relating to the PSCP.

Current eligible costs include renovations and additions to existing schools, building new schools, systemic renovations, projects for disruptive youth, and the Aging Schools Program. Since 1972 more than $2.5 billion have been allocated to LEAs. State capital funding for school construction includes general obligation bond and PayGo funds. The total funds allocated in fiscal year 1998 amounted to $150 million. For fiscal 1999, the IAC has received requests from LEAs totaling $329 million, more than double the fiscal 1998 appropriation. As annually required by law by October 15, this fall the Governor indicated his intent to provide at least $141 million for school

construction in the fiscal 1999 budget, $122 million in bond funds and $19 million in PayGo funds. Since then, the Governor has suggested he will provide $200 million for school construction. The leadership of the House of Delegates and county executives of the State's seven largest jurisdictions have indicated their support of $200 million for school construction in fiscal 1999.

**Recommendation: The task force endorses $200 million for school construction in fiscal 1999, an increase of $59 million in PayGo funds over the amount previously indicated, and an amount supported by the Governor, the House of Delegates leadership, and the county executives.**

**Prince George's County Public Schools**

The Community Schools Education Plan calls for $333 million through FY 2006 in school construction costs to build schools in neighborhoods where schools were previously closed and to enhance the capacity of schools due to increasing enrollment. The plan, which is being revised, currently calls for:

- Building 15 new schools: 11 elementary, 2 middle, and 2 high schools;
- Re-opening four elementary schools previously closed; and
- Adding 198 new classrooms at 29 schools: 17 elementary schools, 7 middle schools, and 5 high schools.

Dr. Yale Stenzler, Executive Director of the Public School Construction Program (PSCP), reported on his analysis of the Prince George's County Public Schools' Community Schools Education Plan (CSEP) and Capital Improvement Program (CIP) for school construction. Dr. Stenzler and his staff have been working with county school officials to clarify items in the CSEP and make suggestions for changes. Based on these discussions and other local decisions, the CSEP is being revised. Because the CSEP addresses enrollment changes, the ending of involuntary busing, and the creation of additional Milliken II and model comprehensive schools concurrently, it was difficult for PSCP staff to isolate the effect of each component. Among the suggestions PSCP staff made were: clarify implementation time frame; reconcile enrollment projections, explain the rationale for classroom additions; verify capacities, estimated costs, and inflation factors for construction projects; and explore additional reopenings of former schools.

In presentations to the task force, Dr. Stenzler reviewed the impact of desegregation court orders on school construction in the county. Between 1971 and 1987 the county closed 61 schools. These actions were taken as a result of decreases in enrollment and the requirements placed on the school system to comply with court-ordered busing. The majority of the schools were located in and around the Washington Beltway in residential neighborhoods where students were bused to other communities to comply with the desegregation order. Once these schools were closed students were

assigned to school attendance areas which in many cases were not contiguous to their previous home school attendance area.

Since 1987, the county has added eight schools bringing the total to 179 public schools operating in the county. Many of these schools are over utilized, particularly the 107 public schools located inside or within one mile of the Washington Beltway. During the 1996-1997 school year, the 80 elementary schools in this geographic area have a utilization rate ranging from 75 to 181 percent, with 56 schools at or above 100 percent. At the 16 middle schools the utilization rate is between 61 and 122 percent with three schools at or above 100 percent. For the 11 high schools the utilization rate was between 70 and 115 percent with five schools at or above 100 percent.

The county also utilizes an additional 396 relocatable classrooms. This is the largest number of relocatables in the State, which serve approximately 10,000 students or more than eight percent of the school system's students (see **Exhibit 6**). Although enrollment projections vary for the next 8 years, by 2001 PGCPS is projected to be 129,310, a 3 percent increase over its current level.

Over the past three fiscal years the county has received more than $37.5 million in State funds for school construction, an average of $12.5 million per year. Over the five year period FY 1991 to FY 1995 the county averaged $7.3 million per year for a total of $36.4 million. The fiscal 1998 appropriation is $20.3 million, up 236 percent from the fiscal 1997 appropriation of $6.05 million. The school system's CIP requests approximately $50 million in FY 1999 and $180 million over the six-year period (through 2004). To access these funds, the Prince George's County Government would have to provide nearly $300 million over the six-year period.

The FY 1999 Capital Improvement Plan is also being revised and has not been approved by the county government. The county must approve the CIP by December 8, signifying its financial commitment to the projects proposed and requested by the Board of Education. After reviewing the school system's Community Schools Education Plan and the FY 1999 Capital Improvement Plan, Dr. Stenzler preliminarily concluded that based on enrollment needs, annual requests of $25 million to 35 million by Prince George's County would not be unreasonable. The two plans address a return to neighborhood schools and facilities to meet the current overcrowding and projected increases in enrollments, regardless of the outcome of the litigation. The revised plans will be reviewed by the PSCP when finalized, and additional recommendations may be forthcoming. PSCP will review project requests annually and monitor enrollment projections and other factors which impact on project approvals.

**Recommendation: Although the State is not a party to the desegregation lawsuit and is under no legal obligation to provide funds to assist the county, the task force recognizes the impact that 25 years of compliance with court-ordered desegregation remedies have had on the school system. In particular, desegregation compliance has fostered instability in the school system's capital program and school construction planning as the system was focused on maintaining racial compositions in enrollments at individual schools. In addition, Prince George's County Public Schools is the largest school system in the State and is pushing its existing schools well**

**beyond their capacity, as evidenced by its high number of portable classrooms. The task force notes that after reviewing the needs of Prince George's County for school construction, Dr. Stenzler concluded that annual requests of $25 million to $35 million from Prince George's County would not be unreasonable.**

**Exhibit 6**

## PUBLIC SCHOOL CONSTRUCTION PROGRAM

**Relocatable Classrooms - as of 6/30/97**

| LEA | STATE | LOCAL | (1) OTHER | TOTAL |
|---|---|---|---|---|
| ALLEGANY | 0 | 2 | | 2 |
| ANNE ARUNDEL | 2 | 109 | | 111 |
| BALTIMORE CO | 9 | 136 | 22 | 167 |
| CALVERT | 15 | 19 | 11 | 45 |
| CAROLINE | 0 | 9 | | 9 |
| CARROLL | 0 | 112 | | 112 |
| CECIL | 4 | 42 | 21 | 67 |
| CHARLES | 36 | 37 | | 73 |
| DORCHESTER | 10 | 0 | | 10 |
| FREDERICK | 4 | 116 | | 120 |
| GARRETT | 0 | 4 | | 4 |
| HARFORD | 7 | 23 | 20 | 50 |
| HOWARD | 2 | 59 | 1 | 62 |
| KENT | 0 | 0 | | 0 |
| MONTGOMERY | 57 | 77 | 69 | 203 |
| PRINCE GEORGE'S | 20 | 376 | | 396 |
| QUEEN ANNE'S | 14 | 29 | 3 | 46 |
| ST. MARY'S | 24 | 48 | | 72 |
| SOMERSET | 3 | 2 | | 5 |
| TALBOT | 0 | 15 | | 15 |
| WASHINGTON | 1 | 33 | | 34 |
| WICOMICO | 0 | 56 | | 56 |
| WORCESTER | 0 | 14 | | 14 |
| BALTIMORE CITY | 4 | 32 | | 36 |
| **Total** | 212 | 1,350 | 147 | 1,709 |

(1) Leased by or available to the LEA

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**Systemic Renovation and the Aging School Program**

On November 25, Dr. Yale Stenzler provided information on systemic renovation and the Aging School program. The Public School Construction Program began providing funds for systemic renovation projects in fiscal 1988. Systemic renovation projects allow a building system to be replaced extending the life of a building without having to renovate the entire facility. Since fiscal 1988 the State has provided $103 million for systemic renovation projects in 479 schools. In December 1995 the rules were modified to allow older existing schools to be improved and made comparable to newer facilities when systemic renovation monies were approved.

The Aging School Program was established as part of Senate Bill 795 enacted in 1997. The legislation provided $4.35 million annually and identified specific allocations for each of the 24 jurisdictions for a five-year period (through fiscal 2002). The funds were distributed based on a formula which took into account the percentage of pre-1960 square footage in each school system and statewide. The Board of Public Works adopted regulations to guide the program, and the IAC administers the program as part of the Public School Construction Program.

In response to a request to address the need for additional funding for Aging School Program projects, State Superintendent Grasmick and Dr. Stenzler developed a proposal for the task force to consider. The proposal would provide an additional $6.02 million for the Supplemental Aging School Program to the 24 jurisdictions based on a variation of the pre-1960 square footage methodology used in Senate Bill 795. The IAC would administer the Supplemental Program as it does the original Aging School Program with similar criteria.

In determining the methodology used to distribute the supplemental funds, "adjusted square footage" was used for schools in each of the 24 jurisdictions. The adjusted square footage figures recognize renovations completed after the original date of construction of the school or additions which were subsequently renovated. The following method was used to allocate the $6 million (**Exhibit 7**):

- LEAs with 0 percent of the State's pre-1960 square footage received a minimum allocation of $40,000 ($280,000 total)
- LEAs with 1 percent of the State's pre-1960 square footage received an allocation of $50,000 ($250,000 total)
- LEAs with 20 percent or more of the State's pre-1960 square footage received a bonus of .7 percent (seven school systems).
- The percentages shown were then applied to the balance of $5,470,000 and allocated to the 12 LEAs with more than 1 percent of the State's pre-1960 footage.

**Recommendation: Provide $6.02 million in additional funds in a Supplemental Aging School Program beginning in FY 1999 (see Exhibit 7 for distribution). The funds should be provided in legislation for a four-year period, consistent with the funding commitments in SB 795 and the time period recommended for the Targeted Improvement Program.**



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Exhibit 7
Supplemental Aging School Program

| LEA | Total | Pre 1960 | % Pre 1960/ LEA | % Pre 1960/ State Total Pre 1960 | Supplemental Aging School Funds |
|---|---|---|---|---|---|
| Allegany | 1,920,184 | 570,541 | 30% | 3% + .7% | $205,000 |
| Anne Arundel | 10,853,113 | 1,009,838 | 9% | 6% | $330,000 |
| Baltimore County | 14,274,362 | 3,835,317 | 27% | 21% + .7% | $1,190,000 |
| Calvert | 1,247,885 | 54,925 | 4% | 0% | $40,000 |
| Caroline | 781,677 | 85,980 | 11% | 1% | $50,000 |
| Carroll | 3,136,412 | 636,537 | 20% | 3% + .7% | $205,000 |
| Cecil | 1,795,148 | 463,669 | 26% | 3% + .7% | $205,000 |
| Charles | 2,636,108 | 37,851 | 1% | 0% | $40,000 |
| Dorchester | 787,087 | 30,332 | 4% | 0% | $40,000 |
| Frederick | 3,955,392 | 98,533 | 2% | 1% | $50,000 |
| Garrett | 745,359 | 90,687 | 12% | 1% | $50,000 |
| Harford | 4,698,532 | 796,725 | 17% | 4% | $220,000 |
| Howard | 4,589,374 | 22,500 | 0% | 0% | $40,000 |
| Kent | 536,108 | 48,412 | 9% | 0% | $40,000 |
| Montgomery | 16,333,415 | 2,275,352 | 14% | 12% | $660,000 |
| Prince George's | 15,472,379 | 1,882,604 | 12% | 10% | $550,000 |
| Queen Anne's | 695,130 | 106,303 | 15% | 1% | $50,000 |
| St. Mary's | 1,698,942 | 177,534 | 10% | 1% | $50,000 |
| Somerset | 574,950 | | 0% | 0% | $40,000 |
| Talbot | 649,498 | 171,212 | 26% | 1% + .7% | $95,000 |
| Washington | 2,861,588 | 358,645 | 13% | 2% | $110,000 |
| Wicomico | 1,862,700 | 477,622 | 26% | 3% + .7% | $205,000 |
| Worcester | 950,088 | 8,702 | 1% | 0% | $40,000 |
| Baltimore City | 18,931,474 | 4,995,851 | 26% | 27% + .7% | $1,515,000 |
| TOTAL | 111,986,905 | 18,235,672 | | | $6,020,000 |

**Multiple Use of Local Facilities**

The task force briefly discussed the use of schools and libraries to provide multiple community services and identified this as an area which requires further consideration. The task force is interested in providing incentives to encourage local jurisdictions to use schools as centers providing multiple services such as social services, health services, job training, and day care to its community, particularly communities with large numbers of "at-risk" children whose families could most benefit from these services.

**Recommendation: The task force requests that the Interagency Committee on School Construction determine the prevalence and structure of schools and libraries serving as multi-service centers for communities. The IAC, in collaboration with the Maryland State Department of Education, should report back to the task force during the 1998 Interim on the activities taking place currently and recommendations for incentives to promote multiple usage of schools and libraries. These recommendations may include but should not be limited to increasing the State's contribution for schools constructed to be multi-service centers, including multi-use schools as a priority when evaluating school construction requests, and encouraging local governments and the State to locate offices of local departments of health and social services in schools or libraries.**

## Certification and Mentoring of Teachers

The task force received information from the Maryland State Department of Education (MSDE) concerning an increase in the number of teachers holding provisional certificates. Since the 1992-1993 school year, there has been a statewide increase in the percentage of provisional certificate holders. In the 1996-1997 school year, 4.7 percent of all certificate holders held a provisional certificate as compared to one percent in the 1992-1993 school year. In Prince George's County, nearly 13 percent of the teacher population employed during the 1996-1997 school year held provisional certificates (see **Exhibit 4**). In some instances, the issuance of a provisional certificate may be necessary to address the h iring shortage of a local school system. However, if the percentage of holders of provisional certificates continues to increase, there may be a negative impact on State and local efforts to meet achievement standards under the Maryland School Performance Program.

MSDE issues provisional certificates in response to the request of a local school system superintendent. The provisional certificate is valid for one year and may be renewed each year when specific conditions are met. Individuals who are issued a provisional certificate do not qualify for professional certificates for the following reasons: 1) not meeting the qualifying score of the State for the teacher certification tests; 2) not having recent credits; 3) not having completed required professional education course work; 4) not having completed required content course work; 5) not having completed required professional education and content course work; and 6) not meeting renewal requirements for a professional certificate in the required time.

Several concerns were raised concerning provisional certificates including: given the significant increase in the percentage of holders of provisional certificates, should the Maryland State Board of Education and the Professional Standards and Teacher Education Board amend


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regulations governing the issuance of provisional certificates so as to limit the amount of time that a provisional certificate may be held depending on the reason why an individual received the provisional certificate; what initiatives are needed to ensure the adequate education preparation of provisionally certificated teachers so that they may qualify for a professional certificate; and what initiatives are needed to meet the on-going instructional support needs of teachers with less than five years of classroom experience so that they may qualify for a Standard Professional Certificate II or an Advanced Professional Certificate.

MSDE has proposed several amendments to the current provisional certification regulations. These amendments are listed in **Exhibit 8**.

**Recommendation: The task force endorses MSDE moving forward with regulatory proposals to address provisional teacher certification issues.**

**The task force also endorses MSDE's proposal for a statewide comprehensive program to address the high and increasing number of provisional teacher certifications, initially focused on the crisis in Prince George's County (also discussed under Prince George's County). The program should assist provisionally certified teachers to become fully certificated. It should establish specific goals and time frames within which to reduce the number of holders of provisional certificates. Upon completion of those goals, the program should terminate. In three years, MSDE should report to the General Assembly on the status of the program.**

**MSDE should implement the statewide comprehensive program in collaboration with the Maryland Partnership for Teaching and Learning K-16.** The Chancellor of the University System of Maryland, the Secretary of the Maryland Higher Education Commission, and the State Superintendent of Schools jointly chair the partnership. The partnership includes business leaders, K-16 education professionals, and local and State governments. This group is well positioned to provide oversight for the development, implementation, and evaluation of an initiative designed to provide quality teacher preparation to holders of provisional certificates. The partnership should also utilize the resources of institutions of higher education throughout the State that provide teacher education. Faculty from institutions of higher education could provide the teacher preparation. A great deal of this training could occur in professional development schools. This initiative would utilize the resources of MSDE, the University System of Maryland, and the Maryland Higher Education Commission to address the educational needs of provisional certificate holders.

**Furthermore, in an effort to increase the number of certificated teachers in the State, the task force recommends that the State Scholarship Administration should evaluate reestablishing the tuition scholarship program for candidates to become teachers in Maryland public schools.** A recipient of a scholarship could be obligated to teach in a Maryland public school for five years. If a recipient fails to fulfill this obligation, the recipient could be required to reimburse the State for the tuition received. If the State Scholarship Administration decides to reestablish a tuition scholarship program, the Administration should consider linking the award of scholarships to individuals who teach: 1) subject matter areas of critical shortage in the State; and 2) in geographical regions of the State that have experienced problems attracting qualified certified teacher applicants.

**Exhibit 8**

| PROPOSED CHANGES TO PROVISIONAL CERTIFICATION REGULATION | | | |
|---|---|---|---|
| ***Issues Considered*** | ***Current Length of Certificate*** | ***Number of Provisional Renewals Permitted*** | ***Recommended Action*** |
| Qualifying score on teacher certification tests | one year and renewable | unlimited | Maximum of 2 provisional certificates |
| Six recent credits | one year | one | Maximum of 1 provisional certificate |
| Required professional coursework | one year and renewable | unlimited | Maximum of 2 provisional certificates |
| Required content coursework | one year and renewable | unlimited | Maximum of 2 provisional certificates |
| Required professional and content coursework | one year and renewable | unlimited | Maximum of 3 provisional certificates |
| APC master's credit or 36 credits<br>Had ten years to earn credit | one year and renewable | unlimited | Maximum of 2 provisional certificates |
| SPC II credit or 6 credits<br>Had three years to earn credit | one year | one | Maximum of 1 provisional certificate |
| Individual lifetime limit on provisional certificates | one year | unlimited | Maximum of 1 to 3 provisional certificates |
| Annual local school system cap | n/a | unlimited | 3% of instructional staff |
| Annual school cap | n/a | unlimited | 3% of instructional staff |
| MSPP Report Card | n/a | n/a | Add teacher certification data to MSPP report card |

- **Not meeting the State qualifying teacher certification test score(s).** Amend the Provisional Certificate regulation to allow individuals, who have not met State qualifying scores on teacher certification tests to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years.

- **Not having recent credits.** Amend the Provisional Certificate regulation to allow individuals, who do not present recent credits to become eligible for a professional certificate, to hold a provisional certificate for a maximum of one (1) year.

- **Not having completed required professional education coursework.** Amend the Provisional Certificate regulation to allow individuals, who do not present required professional education coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years. Qualifying teacher



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certification test scores must be submitted no later than during the second year on the Provisional Certificate.

- ❑ **Not having adequate content coursework.** Amend the Provisional Certificate regulation to allow individuals, who do not present required content coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years. Qualifying teacher certification test scores must be submitted no later than during the second year on the Provisional Certificate.

- ❑ **Not having completed required professional education and content coursework.** Amend the Provisional Certificate regulation to allow individuals, who do not present required professional education and content coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of three (3) years. Qualifying teacher certification test scores must be submitted no later than during the third year on the Provisional Certificate.

- ❑ **Not meeting the renewal coursework requirements for the Advanced Professional Certificate in the required time although holding a Standard Professional Certificate II.** Amend the Provisional Certificate regulation to allow Standard Professional Certificate II holders, who do not present the coursework/degree requirements for the Advanced Professional Certificate, to hold a provisional certificate for a maximum of two (2) years.

- ❑ **Not meeting the renewal coursework requirements for the Standard Professional Certificate II in the required time although holding a Standard Professional Certificate I.** Amend the Provisional Certificate regulation to allow Standard Professional Certificate I holders, who do not present the coursework requirements for the Standard Professional Certificate II, to hold a provisional certificate for a maximum of one (1) year.

- ❑ **Lifetime cap on Provisional Certificates.** Amend the Provisional Certificate regulation to limit any individual to a total of one to three provisional certificates based on the limitations noted above.

- ❑ **Annual Local School System Cap.** Amend the Provisional Certificate regulation to limit any school system from employing no more than three (3) percent of its instructional staff on provisional certificates.

- ❑ **Annual School Cap.** Amend the Provisional Certificate regulation to limit any school within a school system from employing no more than three (3) percent of its instructional staff on provisional certificates.

- ❑ **Maryland State Department of Education Report Card.** Modify the Maryland School Performance Report to include a section on the qualifications of teachers. Each school and each local school system would display in their official State "report card" the certification of instructional staff on an annual basis.

**The task force believes that each local education agency should consider implementing a teaching mentoring program such as the mentoring program in Baltimore County.** The goal of a mentoring program is to retain teachers. Baltimore County has received a three year grant to provide mentors for the approximately 900 teachers it recently hired as a result of the large turnover of teachers at some schools. The initial years of any professional career present work-related challenges to any new professional, regardless of how well the professional has been trained. Research demonstrates that new teachers who receive the continuous support of a skilled mentor are more likely to remain in the profession and more likely to make progress towards enhancing student learning in the classroom.

## Professional Development

Testimony was provided at a briefing on October 16, 1997, demonstrating that professional development is an essential element of a successful system of education. The success of a school correlates with the quality and accessibility of professional development opportunities for its teachers and administrators. The Maryland State Board of Education (MSDE) has endorsed the recommendations of the Maryland Business Roundtable for Education, which emphasize the need to link staff development activities directly to student performance. These recommendations emphasize the importance of ensuring that results-oriented professional development is a component of every school improvement plan and requiring that a great degree of professional development activity be school-based. In addition, the individual professional development plans adopted by teachers in pursuit of recertification must establish a link between clearly defined needs and goals, appropriate learning activities, and improved results.

MSDE has established Regional Professional Development Networks with the goal of linking professional development to improvements in K-12 instruction and student achievement. Each local school system must report the following data to MSDE: 1) the number of participants trained; 2) the reactions of participants to staff development activities; 3) evidence of participants' learning as a result of activities implemented; 4) evidence of participants' use of skills and knowledge acquired; and 5) documented results of program effectiveness, the degree of achievement of each, and the impact of the initiative on classroom instruction and student learning. During fiscal 1998, MSDE awarded grants to individual school systems based on plans approved by the department. Beginning in fiscal 1999, in order to receive grants from MSDE, school systems must submit regional plans to MSDE that address both common and unique professional development needs.

Members expressed concerns regarding whether each local education agency should be required to have a strategic plan for the implementation of professional development activities that are linked to the goals of the school improvement plans and the goals of the local education agency and whether local education agencies can ensure that teachers have adequate time to engage in appropriate professional development activities.

Furthermore, testimony provided to the task force indicated that the current delivery of professional development has significant inconsistencies, and in some instances, deficiencies, from one local education agency to another. The task force has identified various factors that contribute to these deficiencies, including the limited availability of time for teachers to engage in professional development, the limited funding resources of local education agencies, and certain provisions of collective bargaining agreements.

The task force intends to seek additional input from various interested parties, including MSDE, principals, local superintendents, local boards of education, and collective bargaining units. In addition, the accountability subcommittee will examine a report issued by the National Foundation for the Improvement of Education that describes the elements of an effective system of professional development. The report confirms the conclusion of the task force that quality professional development impacts directly on student learning. The recommendations of the report include school-based professional development, the integration of information technologies in professional development programs, the adoption of more flexible scheduling during the school year, and the implementation of programs throughout the calendar year to provide adequate time for professional development.

**Recommendation: The task force affirms the importance of continuing education through professional development efforts, especially for all persons directly involved in the instruction of students, and recommends that discussion of professional development issues continue during the 1998 Interim. The task force requests that MSDE study the professional development issues raised in this document and report its recommendations to the task force by June 1, 1998. While further study is needed to ascertain more effective means for the delivery of professional development, the task force strongly recommends continued advocacy and State support for professional development initiatives.**

## Professionally Certificated Personnel Accountability for Student Performance

During an October 16, 1997 briefing, members received information that two of the local school systems are utilizing student performance as factors in personnel evaluations. For example, during the 1997-1998 school year, Anne Arundel County plans to pilot in the "South River Cluster" a new teacher rating instrument that links teacher evaluations to what students are learning. For example, the Teacher Rating Report includes the following competencies: 1) utilizes effective measurement tools for student performance; 2) identifies strategies and techniques to contribute to growth and success with the Maryland School Performance Program; 3) gives students timely feedback regarding performance; 4) obtains student feedback to revise instructional techniques; 5) improves student performance; and 6) restructures as necessary based on student performance. In Baltimore County, the Evaluation of Teacher Progress includes a component that emphasizes the assessment of student learning to enable teachers to know if students have met the instructional goals for the unit or lesson. To fulfill this component, a teacher should: 1) implement a student assessment program that is ongoing and uses varied approaches; 2) match assessment and instruction

so that students demonstrate the ability to apply new learning; 3) provide evidence of student learning on a daily basis; 4) develop clear assessment criteria and standards and communicate them to students and parents; 5) provide accurate, substantive, constructive, and specific feedback to students in a timely manner; and 6) use daily assessment results to plan for re-teaching, reinforcement, enrichment, and future instruction.

The task force considered issues surrounding personnel evaluations, such as: should professionally certificated personnel evaluation instruments utilized by local education agencies contain criteria that hold teachers accountable for the performance of their students and principals accountable for the performance of their schools; what systems of personnel evaluation currently exist which could provide a successful model for evaluations; and what data are available from which accurate conclusions may be drawn.

**Recommendation: The task force recommends that MSDE convene the appropriate interested parties, including teachers, principals, and representatives of local education agencies, local boards of education, and collective bargaining units, to study the issue of professionally certificated personnel accountability for student performance. The study should be a joint effort of MSDE and the interested parties. The study participants should identify the elements of a fair evaluation system of professionally certificated personnel that could link the performance of principals to the performance of their schools and the performance of teachers to the performance of their students. The evaluation system should take into account the different backgrounds and prior performances of students.**

## Financial Accountability

In recent years there has been increased attention given to financial accountability in public education at both the State and local levels. During the 1996 Legislative Session, the General Assembly passed legislation that altered the reporting requirements for the county boards of education and changed the maintenance of effort requirements for education funding.

Additionally, in a report issued by the Office of Legislative Audits on LEA fiscal accountability, the auditors recommended that the Maryland State Department of Education implement a comprehensive financial reporting model to provide consistency in reporting and to facilitate monitoring of school expenditures. In the 1997 Session Joint Chairman's report the budget committees indicated their strong support of the Legislative Auditor recommendation that the financial information be organized in a manner that facilitates meaningful analysis of LEA expenditures and assists the State Department, local governments, and LEAs in making decisions to improve the efficiency and quality of education.

On several different occasions, members discussed their concerns surrounding financial accountability including: should more be done by the Maryland State Department of Education to improve the comparability of expenditure data provided by the local education agencies; should MSDE provide further analysis of expenditure reports to determine efficiencies at the local level;

are the reforms initiated during the 1996 legislative session designed to increase financial accountability at the local level through increased expenditure reporting requirements and the authorization of performance audits working; what has been done by the local education agencies to provide meaningful expenditure detail to the State and local governments that accurately and uniformly reflects expenditures; Is there a need for the local school systems to purchase a uniform financial reporting model; and what has been done by the local governments to ensure accountability of education expenditures.

**Recommendation: The task force agrees that the large financial commitment of State and local dollars to education justifies significant financial accountability measures. The task force believes that the Maryland State Department of Education (MSDE) must be accountable for how the local education agencies (LEAs) are spending education aid. Additionally, the task force asserts that the LEAs must provide meaningful expenditure detail to State and local governments.**

**The subcommittee recommends that a small study group be created by MSDE, consisting of MSDE, the financial officers of several local school boards, and two chief financial officers of Maryland-based corporations, to examine the issues surrounding financial reporting systems. The study group should make recommendations regarding the issues identified above and the potential for having a statewide financial reporting model that facilitates meaningful analysis of LEA expenditures and assists MSDE, local governments, and LEAs in making decisions to improve the efficiency and quality of education. The study group should report its recommendations to the task force when it reconvenes after the 1998 legislative session.**

## Use of the Maryland School Performance Program (MSPP) Results

Testimony was received on October 6 on how the Maryland School Performance Program (MSPP) data is used by the State Department of Education and the local education agencies to guide school improvement. This information was provided by a representative from the Maryland State Department of Education and from local accountability coordinators from five local education agencies including: Allegany, Anne Arundel, Calvert, Harford, and Worcester Counties.

The State Department of Education provided background on the core components of the Maryland School Performance Program. Prior to the establishment of the Maryland School Performance Program, the State Department of Education lacked an adequate data base to accurately measure the performance of schools. The inadequacy of the data base highlighted the lack of accountability. In response, beginning in 1990, the State Board of Education began to approve a series of School Performance data-based areas to measure school characteristics and school performance. Data-based areas measure how well schools, school systems, and the State prepare each student for higher education and successful careers.

The local accountability coordinators unanimously agreed that the Maryland School Performance Program (MSPP) has been a useful tool in guiding school performance. MSPP has provided common goals, instructional models, and desired student outcomes on a statewide basis.

The MSPP has generated a shift in the education paradigm throughout the State. As a result, schools and school systems know what is expected from them based on the State standards. The accountability coordinators shared with members how school systems analyze school performance data to guide school improvement.

Additionally, during a joint presentation to the Subcommittee on Education Funding Equity and the Subcommittee on Accountability, Dr. Grasmick provided members with recommendations for school performance accountability that are applicable to all jurisdictions within the State.

Ultimately, the Superintendent indicated that the measure of success for school improvement is student progress towards meeting State standards on MSPAP, Maryland Functional Tests, attendance, and dropout rates. To reach these goals, schools must have school improvement plans that are used to systematically evaluate their progress towards achieving the milestones and benchmarks delineated in the plan. The school improvement plans must integrate strategies and activities to meet instructional improvement needs for all students in all grade levels. The plans must include resource allocations and time lines with realistic start and completion dates for strategies and activities. Also, the plans must include staff development tied to intervention strategies and activities identified to improve instruction. The State Superintendent supplied guidelines for developing a school improvement plan (See **Appendix 3**).

The information provided to the members raised questions regarding, to what extent does the Maryland State Department of Education receive information concerning the use of MSPAP data by local school systems and schools and ensure that constructive changes are made at the local level in response to the data and what more can be done by the State Department of Education and the local education agencies to enable individual schools to make critical changes in response to the Maryland School Performance Program results.

**Recommendation: The task force recommends that the Governor and the General Assembly continue to publicly support the Maryland School Performance Program (MSPP) as it continues to be refined, as well as, continue to provide financial resources for the program to ensure adequate funding. In addition, the task force supports MSDE's continued efforts to refine the Maryland School Performance Program (MSPP). The task force also recommends that MSDE seek assurance from each LEA that the school system is taking action to improve low performing schools that are continuing to decline on MSPP performance indicators.**

**In relation to using the MSPP to guide school improvement, the task force recommends that the Maryland State Department of Education (MSDE) expand the department's regulations to require the local school systems to use the Maryland School Performance Program data to guide school level change in school improvement plans. Additionally, the department should require each LEA to report the overall system report card to the LEA's citizens.** The LEA should ensure that each school provide copies of its MSPP report card to the parents and guardians of the school's students. In addition, the task force recommends that the Maryland State Department of Education (MSDE) develop departmental regulations requiring all schools, not just reconstitution

eligible schools, to evaluate their school improvement plans on an annual basis. **Appendix 3** displays the guidelines of MSDE for the development of a school improvement plan. The task force believes that these guidelines should be endorsed by the department and the local education agencies.

**The task force also recommends that local school systems target resources to schools to meet the needs identified in school improvement plans.** It is incumbent upon the school systems to systematically evaluate the progress of schools relative to their school improvement plans and Maryland School Performance Program results, validate effective practices, and disseminate those practices.

**The task force further believes that MSDE needs additional funding in order to provide the necessary support for school improvement to the local school systems. Additional funds should be used to improve the information processing capabilities of MSDE for tracking and measuring the impact of additional aid and for hiring staff who can provide additional support to poor performing schools. Adequate resources should also be provided to the department to implement the Internet technology that is being designed by MSDE and the University of Maryland. The technology will allow school systems and individuals across the State access to a website containing information that will aid individual schools in school level improvement.**

## Public/Private Partnerships

### Background

The goal of the recommendations related to public/private partnerships is to foster a cooperative relationship between the education community and the business community to help ensure that students possess the necessary knowledge and skills to succeed in and add value to the Information Age workplace. The task force finds that partnerships are mutually beneficial arrangements for businesses and schools. Businesses, schools, higher education institutions, government, non-profits, communities, and parents have a vested interest in an effective educational system. Partnerships are being formed statewide to provide students with an enhanced and responsive educational system that will ensure a well-educated, highly adaptable workforce. Strong partnerships are critical to establishing higher standards for students, meaningful professional development opportunities for teachers, and effective governance structures.

Over the past several years, the Maryland State Department of Education has been at the forefront of establishing high student performance standards with strong accountability measures. School systems are held responsible for producing graduates who are able to communicate effectively and demonstrate competency in complex problem-solving. A private-sector partner can offer many talents and resources that might not otherwise be available. By engaging all stakeholders in the educational process, there can be shared responsibility and accountability for outcomes.

Once a partnership has been identified and implemented, the rewards can be satisfying and unlimited. Partners can quantify objectives and goals; build community support for schools; create learning opportunities for students; provide staff training; become tutors and mentors; and help create total strategic planning for a school. The subcommittee found that many school systems do not have a professional staff person whose function is to identify and facilitate the creation of partnerships. A full-time professional to leverage the resources and talents of the business community is a critical component of a public/private partnership program within a school system. Evidence[1] suggests that the returns from these individuals far exceeds the costs, and this evidence should be considered carefully by local school boards and county governments when making annual budget decisions.

To complement current partnership efforts, the task force offers the following set of recommendations that match private resources with educational needs. These recommendations have been formatted differently from the rest of the report to reflect the decision-making process of the Partnership subcommittee. That subcommittee systematically approached each issue by identifying the goal, reasons to implement it, its fiscal impact and the lead advocate. While the lead advocate is a person or organization that has expressed an interest in the goal, the identification of a lead advocate is not intended to exclude or discourage the involvement of others. For clarity, the

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[1]Montgomery County's Corporate Partnership for Managerial Excellence is one example where the cost of producing a report has been leveraged into over $750,000 in savings through its recommendations for improving operations of the school system.

partnership recommendations have been prioritized according to the following four categories: 1) Effective Management; 2) Workforce Skills Development; 3) Promoting Success; and 4) Eliminating Barriers.

**Effective Management**

| | |
|---|---|
| **Topic:** | **Corporate Partnership for Managerial Assistance** |
| Recommended Action: | Use private-sector expertise to improve the performance of the non-academic support operations of local school systems. Senior private-sector employees would collaborate with local school systems' upper-level administrators in peer-to-peer teams to recommend improvements in the system's administrative, logistical, and planning processes. Peer teams would evaluate the efficiency of routine matters that can impact a school system's overall performance, such as data operations, transportation, finance, facilities management, food services, and personnel. Each local school system would organize and recruit businesses for its partnership team. |
| Reasons: | School systems have been forced to downsize their administrative operations as scarce dollars have been directed toward classroom instruction. In addition, parents and taxpayers expect a high quality of service in the administrative support services. Hence, school administrators are encouraged to examine the practices of the private sector to become more effective with reduced resources.<br><br>In Montgomery County, from 1993 to 1996, the Corporate Partnership for Managerial Excellence (CPME) undertook an effort to help improve the performance of the non-academic support operations of the school system. Senior employees of 16 county-based firms collaborated with upper-level administrators in 11 peer teams that recommended 125 improvements in the system's administrative operations. The CPME has remained committed to helping the school system carry out its recommendations at virtually no cost and considerable savings to taxpayers. The CPME has been nationally recognized as an exemplary public/private partnership for its school improvement efforts. |
| Lead Advocate: | Maryland State Department of Education, Division of Business Services |
| Fiscal Impact: | Cost of the evaluation would be absorbed by the corporate partners. |
| **Appendix 4**: | The Corporate Partnership on Managerial Excellence: Occasional Paper #16 |

**Topic:** **Local Partnership Coordinators**

Recommended Action: Encourage each school system to identify a corporate education specialist or partnership coordinator to facilitate the development of public/private partnerships. This person would:

1) develop a partnership plan that would support local and State education priorities;
2) assist the local superintendent and system staff members in developing and nurturing collaborative partnerships for all students, including disadvantaged students;
3) develop or enhance superintendent/business advisory councils and/or local partnership 501(c)(3) foundations;
4) work with local chambers of commerce and other businesses and community organizations to identify areas for collaboration and mutual interests; and
5) work with the Maryland State Department of Education's partnership office and other school systems' partnership coordinators as a team in developing entrepreneurial projects and partnership programs that will garner people and financial resources for local education improvement efforts.

Local chambers of commerce would also be encouraged to identify partnership coordinators, who would serve as conduits to the schools' coordinators and facilitate the delivery of business resources.

Reasons: Education research says, without a doubt, that well organized business and community partnerships are significant factors in the longevity and effectiveness of school improvement efforts. Developing and sustaining partnerships demands expertise, people skills, and time; it will not be accomplished without dedicated personnel and a State and local team strategy. In meeting the challenges of our global 21st century economy and the keen interest in high quality education for high quality workers, this position is mandatory for today's education and business organizations.

One of the outstanding benefits of this position is that this individual is bringing value to the school system that otherwise would not be there. School systems can leverage the position so that monies brought into the school system more than offset the salary and benefit costs. Local school districts could set a measurable threshold (in terms of donated tutoring hours, equipment or supplies donations, etc.,) that the individual must meet for continued employment.

| | |
|---|---|
| Lead Advocate: | Maryland State Department of Education, Office of State Partnerships and Recognition Programs |
| Fiscal Impact: | Cost of the salary and benefits for the school's partnership coordinators to be borne by the local school board. |

**Workforce Skills Development**

**Topic:** **Corporate Resident Teachers (CRTs)**

Recommended Action: Encourage private-sector employees to work as teaching assistants to provide additional classroom assistance to students. CRTs would work with teachers throughout the semester, providing tutoring, mentoring and "real world" experiences and instruction. When teachers know they will miss classes for professional development or personal reasons, CRTs assigned to their classes could be used rather than regular substitute teachers.

Retirees, or those nearing retirement, would be encouraged to become CRTs, with some choosing to teach as a second career. Those volunteering would register with Maryland State Department of Education. The department would then track the volunteers' progress toward achieving the prerequisites for certification through the Resident Teacher program, which requires that Resident Teacher candidates:

1) hold a bachelor's degree from an accredited institution with a concentration in a discipline appropriate to an assignment in the elementary or secondary school curriculum;
2) present grades of "B" or better in the major area of study;
3) present qualifying scores on teacher certification tests approved by the State Board of Education; and
4) complete 90 clock hours of study as a resident teacher.[2]

Information regarding the pool of CRTs who have satisfied resident teacher certification requirements would then be made available to local superintendents. Local school districts, most of which currently do not hire professionals with resident teacher certification, would be encouraged to hire CRTs who are eligible for certification under the Resident Teacher regulations.

Issues to be resolved by the local school districts, working with MSDE, include the liability of school districts using CRTs as substitute teachers; supervision and orientation of the volunteers; and the perception that a resident teacher certification is a substandard certification.

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[2]These prerequisites conform with the current regulation for the Resident Teacher program.

| | |
|---|---|
| Reasons: | Students benefit by being exposed to industry participants who can relate actual workplace situations to classroom instruction. For instance, an individual with industry experience possessing a degree in engineering could work with a teacher to provide one-on-one assistance to science and math students. Schools benefit by having a pool of experienced professionals to draw upon as substitute teachers. Further, these volunteers would occasionally save the schools the cost of a substitute teacher. Finally, retirees would benefit by providing them with a structure for turning teaching into a second career. |
| Lead Advocate: | Maryland State Department of Education, Division of Accreditation and Certification |
| Fiscal Impact: | The department estimates that 1.5 to 2.0 full-time equivalent positions would be required to promote and administer this program. |
| **Appendix 5**: | Maryland State Department of Education regulation on Resident Teacher Certification |

**Topic:** **Workforce Skills Development/Technology Assessment**

Recommended Action: Produce a ten-year technology and workforce assessment of the skills needed by high school graduates to succeed in the workplace of the future. This report would be produced for the Governor and General Assembly and presented by the Maryland State Department of Education (MSDE), the Maryland Department of Business and Economic Development (DBED) and their partners to the State Board of Education and local school boards and superintendents.

To enhance workforce skills development and technology use and infrastructure in the K-16 system, two assessments will be conducted. The purpose of the assessments is to ascertain what type of workforce businesses will need in ten years and what equipment and curriculum school systems currently use. (1) DBED will partner with the Maryland Business Roundtable for Education (MBRT) and the High Technology Council of Maryland to conduct at least bi-annually an assessment of Maryland employers workforce skills development and workforce preparedness needs; and (2) MSDE will partner with MBRT and the High Technology Council to assess at least bi-annually current technology equipment, use, and curriculum in local schools.

A ten-year technology plan and technology/technical skills education program of study will be produced from these assessments. An update on the implementation of this plan and its assessments will be conducted at least bi-annually. The report would include recommended performance outcomes and measurements for determining local schools achievement of the ten-year workforce skills development and technology plan.

The report would lead to an improvement of MSDE's standards for technology and technical skills education curricula (see COMAR Title 13A.04.01). The report would also encourage local school systems to work with businesses and universities to determine if their technology/technical skills curricula and technology infrastructure are compatible with workplace needs. Each school system would update its technology/technical skills education program and its technology plan bi-annually.

Reasons: According to a survey on the State's workforce needs by the Maryland Business Research Partnership, nearly 80 percent of firms contacted for the survey reported either "some" or "a great deal" of

difficulty finding skilled workers for the high performance workplace. In addition, 68 percent of the companies surveyed provided some form of employee training to increase worker productivity or to improve technical skills. For this reason, a technology skills assessment will provide schools with crucial information to design appropriate training and curriculum. In addition, DBED will market to businesses located in Maryland and firms considering locating in the State that Maryland is the first state to have ten-year workforce skills development and technology plan.

Lead Advocates: Maryland Department of Business and Economic Development, Maryland State Department of Education, Maryland Business Roundtable for Education, and the High Technology Council of Maryland

Fiscal Impact: Cost of the workforce skills and technology assessment could be absorbed by the business partners. The cost of producing and updating the report could be absorbed by MSDE and DBED.

**Appendix 6**: Maryland State Department of Education regulations on Technology Education

| | |
|---|---|
| **Topic:** | **Professional Development Opportunities Web Page** |
| Recommended Action: | Identify a private-sector partner to develop and manage a web page of private-sector continuing education programs open at no cost to teachers and school administrators. Major private-sector companies would be encouraged to reserve slots in their non-proprietary employee training programs for teachers and administrators. School systems also would be encouraged to open their professional development training programs to the private-sector. A corporate resident teacher could cover the classroom assignment for a teacher taking advantage of a professional training opportunity. |
| Reasons: | Teachers benefit, at no cost to the school system, from new professional development opportunities that update their knowledge and skills in order to keep pace with changes in society and the workforce. |
| Lead Advocates: | Maryland Business Roundtable for Education and the Maryland State Department of Education, Division of Instruction and Staff Development |
| Fiscal Impact: | Development and maintenance costs for the web page would be absorbed by the business partner. No additional training expenses would be incurred by either the businesses or the school system, as the slots to be filled would otherwise be empty. |

**Promoting Success**

| | |
|---|---|
| **Topic:** | **Partnership Celebration and Expo** |
| Recommended Action: | Arrange for an annual, statewide forum for educators and business leaders to showcase ideas for developing partnerships. The forum would be an opportunity for interested parties to celebrate the progress made toward achieving goals from the previous year and to develop and update goals for the upcoming year.<br><br>A trade show style "Expo," highlighting innovative partnerships, program ideas, and resources available to educators, would be held in connection with the forum and would be open to businesses from across theState.<br><br>Statewide media interest would be stimulated beforehand. The participation of the Governor, State Superintendent of Schools, and other education and business leaders would be requested. Local newspapers would be encouraged to produce an annual partnership supplement that:<br><br>1) highlights the success of public/private partnerships in the local school system; and<br>2) lists all public/private partnerships in the local school system, with a short explanation of each and the party to contact for further information.<br><br>Regional Partnership Forums and Expos at other times of the year also would be encouraged. |
| Reasons: | To share best practices and to demonstrate and highlight the resources businesses will make available to local schools, whether it be the donation of time for tutoring or mentoring programs or the donation of equipment or supplies. |
| Lead Advocate: | Maryland State Department of Education, Office of State Partnerships and Recognition Programs, and Bell Atlantic |
| Fiscal Impact: | Indeterminate |

**Topic:** **Teacher In Residence**

Recommended Action: Enhance the role of the Teacher of the Year by providing opportunities for the teacher selected for this honor to:

1) speak with other teachers around the State and share innovative classroom ideas;
2) be a spokesperson on education issues by regularly addressing business and public policy gatherings; and
3) serve as a resource for the Maryland State Department of Education for one year following the award.

The goal of increasing the role of the Teacher of the Year is to keep education issues at the forefront of all public policy discussions.

While the Teacher of the Year award is generally given in the fall, the individual would not serve "in residence" at the Maryland State Department of Education until the following school year to ensure that current pupils do not miss out on the opportunity of learning from the teacher. Further, the Maryland State Department of Education would need to identify a "runner- up" Teacher of the Year to fulfill the "in residence" requirements should the Teacher of the Year be unable or unwilling to participate.

Businesses could be active supporters of the program by donating meals and lodging for the traveling teacher.

Reasons: Educators, administrators, legislators, and business leaders across the State would benefit from hearing and questioning directly the Teacher of the Year. These meetings would allow local teachers to gain insight into the innovations and activities for which this person is being recognized, while legislators and business leaders would hear firsthand the of the challenges and needs facing today's teachers.

Lead Advocate: Maryland State Department of Education, Office of State Partnerships and Recognition Programs

Fiscal Impact: The Governor should include in his annual budget for the department an amount to reimburse the local school system's cost of hiring a substitute teacher to cover the Teacher In Residence's classroom assignment.

**Eliminating Barriers**

| | |
|---|---|
| **Topic:** | **Workers' Compensation for Students in Unpaid Work-based Learning Experiences** |
| Recommended Action: | Support legislation amending the Workers' Compensation Act to apply to students who engage in unpaid learning experiences. This legislation would be similar to SB 394 from the 1997 Legislative Session. |
| Reasons: | While many employers are working with schools to provide work-based learning opportunities, others are reluctant because of liability concerns. Legislation is needed to provide students with coverage under the Workers' Compensation Act thereby limiting employers' liability in the event that a student is injured while engaged in an unpaid work-based learning experience. It is also needed to protect students against medical expenses that result from such an injury.<br><br>SB 394 from the 1997 Legislative Session was amended in both the Senate and the House and sent to conference committee, where it died during the final days of the session. The Worker's Compensation Benefit and Insurance Oversight Committee examined the provisions of SB 394 during the 1997 Interim. Issues to be clarified include calculating lost wages for students in unpaid learning experiences and determining compensation for permanent injuries. The Maryland State Department of Education will introduce legislation as a departmental bill in the 1998 Session to address these issues. |
| Lead Advocates: | Maryland State Department of Education, Division of Career Technology and Adult Learning; Delegates Hixson and Holt. |
| Fiscal Impact: | Minimal increase in expenditures for private employers and State agencies placing students in unpaid work-based learning positions. |
| **Appendix 7**: | SB 394 from the 1997 Legislative Session and its fiscal note. |

# Appendix 1

This press release established the task force and set forth its charge:

**MEDIA ADVISORY**

**CONTACT:** Roz Hamlet
Speaker's Office
(410) 841-3916

Judi Scioli
Governor's Office
(410) 974-2316

**NEW EDUCATION TASK FORCE TO SEEK EQUITY AND ACCOUNTABILITY IN SCHOOL FUNDING**

**ANNAPOLIS, MD --** Today Governor Parris N. Glendening and House Speaker Casper R. Taylor, Jr. jointly announced the appointment of members to the Task Force on Education Equity, Accountability, and Partnerships, which will undertake a comprehensive review of education funding and program throughout grades K-12 to ensure that students throughout Maryland have an equal opportunity at academic success.

One of the main goals of the task force will be to determine if inequities or "gaps" exist in funding programs earmarked for Maryland students who are believed to be "at risk".

"There is a strong perception in certain parts of the state that inequities in public school funding persist with the result that student achievement is compromised, especially children from disadvantaged or non-English speaking backgrounds," said Speaker Taylor.

"If this is true, then we cannot pretend this situation won't ultimately impact every Maryland citizen," said Taylor, who began expressing concern almost immediately after the '97 Session ended that the education funding issue for the counties may not have been adequately addressed.

Governor Glendening said, "This task force was created to address some very important issues raised during the 1997 legislative session. The members whom we have appointed today believe, as I do, that education must be our highest priority. This is a significant step in our continuing efforts to assure every child in Maryland the highest education possible."

Taylor said he hopes the group also will develop greater accountability systems by which the General Assembly and the public can be assured that school systems and school leaders are held accountable for meeting appropriate educational and fiscal standards, including better leveraging of the money that the state currently spends.

**(MORE)**

The 28- member group will be chaired by former state delegate, Gene Counihan. Three subcommittees on funding equity, accountability, and public/private partnerships will be chaired by Tim Maloney, Rosetta Kerr Wilson, and Larry Shulman, respectively. State Superintendent Nancy Grasmick will serve as one of four Administration officials on the task force.

In addition to the chair and three co-chairs, the group will include six other private citizens. Five legislators from both the Appropriations and Ways and Means Committees as well as representatives from the Maryland Association of Counties, the Maryland State Teachers Association, the Maryland Association of Boards of Education, and the Public School Superintendents Association of Maryland will complete the committee membership.

"I applaud the Speaker and the Governor for taking the leadership to address this most important issue. We have a great challenge; our citizens want quality education for their children. They expect schools to be equitably funded, to be held accountable for results, and to make use of all available public and private resources," said Counihan.

The study will begin with a thorough review on the broad spectrum of education programs, goals, and funding methods as well as accounting procedures, program accountability, and existing partnerships between Maryland schools and the private sector. The group will make a preliminary report of its findings and recommendations by December 15, 1997. A final report will be completed in 1998.

# Appendix 2

## Targeted Improvement Grant
### Targeted Improvement Program
### Fiscal 1999

Foundation Amount: $96

| County | FRPM Count | 85% FRPM Count | Base Amount* | Wealth Base | Wealth Factor** | Unadjusted Allocation*** | Final Allocation |
|---|---|---|---|---|---|---|---|
| Allegany | 5,197 | 4,417 | $424,032 | $1,584,050,472 | 0.6153199 | $689,124 | $528,766 |
| Anne Arundel | 11,318 | 9,620 | 923,520 | 19,839,749,070 | 1.1559461 | 798,930 | 613,020 |
| Baltimore City | 72,617 | 61,724 | 5,925,504 | 12,773,419,620 | 0.5252333 | 11,281,661 | 4,328,217 |
| Baltimore | 27,463 | 23,344 | 2,241,024 | 27,256,887,205 | 1.132916 | 1,978,103 | 1,517,801 |
| Calvert | 2,053 | 1,745 | 167,520 | 3,347,506,184 | 0.9743053 | 171,938 | 131,928 |
| Caroline | 2,342 | 1,991 | 191,136 | 705,861,502 | 0.5460733 | 350,019 | 268,570 |
| Carroll | 2,481 | 2,109 | 202,464 | 5,191,739,879 | 0.8242747 | 245,627 | 188,470 |
| Cecil | 3,390 | 2,882 | 276,672 | 2,610,961,265 | 0.7419946 | 372,876 | 286,108 |
| Charles | 4,806 | 4,085 | 392,160 | 4,271,952,596 | 0.8535754 | 459,432 | 352,523 |
| Dorchester | 2,424 | 2,060 | 197,760 | 869,793,994 | 0.7401116 | 267,203 | 205,025 |
| Frederick | 4,948 | 4,206 | 403,776 | 6,934,928,420 | 0.8616999 | 468,581 | 359,543 |
| Garrett | 2,261 | 1,922 | 184,512 | 925,662,059 | 0.755277 | 244,297 | 187,450 |
| Harford | 6,550 | 5,568 | 534,528 | 7,274,233,439 | 0.8161073 | 654,973 | 502,561 |
| Howard | 3,887 | 3,304 | 317,184 | 11,300,197,980 | 1.194447 | 265,549 | 203,756 |
| Kent | 1,071 | 910 | 87,360 | 727,544,871 | 1.1160433 | 78,277 | 60,062 |
| Montgomery | 27,169 | 23,094 | 2,217,024 | 46,584,267,207 | 1.6064084 | 1,380,112 | 1,058,962 |
| Prince George's | 52,148 | 44,326 | 4,255,296 | 24,405,995,698 | 0.8242295 | 5,162,756 | 3,961,390 |
| Queen Anne's | 1,208 | 1,027 | 98,592 | 1,621,256,135 | 1.0770872 | 91,536 | 70,236 |
| St. Mary's | 3,591 | 3,052 | 292,992 | 2,647,933,809 | 0.792091 | 369,897 | 283,822 |
| Somerset | 1,765 | 1,500 | 144,000 | 422,626,552 | 0.597671 | 240,935 | 184,870 |
| Talbot | 1,188 | 1,010 | 96,960 | 1,761,627,433 | 1.6817337 | 57,655 | 44,239 |
| Washington | 5,878 | 4,996 | 479,616 | 3,681,865,885 | 0.7927494 | 605,003 | 464,220 |
| Wicomico | 4,800 | 4,080 | 391,680 | 2,258,429,775 | 0.6996174 | 559,849 | 429,573 |
| Worcester | 2,455 | 2,087 | 200,352 | 2,800,845,319 | 1.780598 | 112,520 | 86,336 |
| Total | 253,010 | 215,059 | $20,645,664 | $191,799,336,369 | 1 | $26,906,852 | $16,317,448 |

Notes:

* Base amount equal to $96 times 85% of the FRPM count from the second prior year.

** Wealth factor equals each county's wealth per pupil divided by the statewide wealth per pupil.

*** Unadjusted allocation equals base amount divided by wealth factor.

Prepared by the Department of Legislative Services, January 1998

## Limited English Proficiency Grants
### Targeted Improvement Program
### Fiscal 1999

Grant: $1,350

| County | Proposed LEP Count | Total Proposed Allocation | Current LEP Count | Current LEP Aid | Additional LEP Aid |
|---|---|---|---|---|---|
| Allegany | 5 | $6,750 | 5 | $2,500 | $4,250 |
| Anne Arundel | 459 | 619,650 | 361 | 180,500 | 439,150 |
| Baltimore City | 551 | 743,850 | 465 | 232,500 | 511,350 |
| Baltimore | 1,318 | 1,779,300 | 1,163 | 581,500 | 1,197,800 |
| Calvert | 18 | 24,300 | 18 | 9,000 | 15,300 |
| Caroline | 62 | 83,700 | 44 | 22,000 | 61,700 |
| Carroll | 64 | 86,400 | 37 | 18,500 | 67,900 |
| Cecil | 32 | 43,200 | 26 | 13,000 | 30,200 |
| Charles | 76 | 102,600 | 62 | 31,000 | 71,600 |
| Dorchester | 34 | 45,900 | 27 | 13,500 | 32,400 |
| Frederick | 144 | 194,400 | 135 | 67,500 | 126,900 |
| Garrett | 0 | 0 | 0 | 0 | 0 |
| Harford | 134 | 180,900 | 90 | 45,000 | 135,900 |
| Howard | 871 | 1,175,850 | 730 | 365,000 | 810,850 |
| Kent | 33 | 44,550 | 28 | 14,000 | 30,550 |
| Montgomery | 7,269 | 9,813,150 | 5,551 | 2,775,500 | 7,037,650 |
| Prince George's | 4,448 | 6,004,800 | 3,501 | 1,750,500 | 4,254,300 |
| Queen Anne's | 21 | 28,350 | 16 | 8,000 | 20,350 |
| St. Mary's | 58 | 78,300 | 37 | 18,500 | 59,800 |
| Somerset | 31 | 41,850 | 20 | 10,000 | 31,850 |
| Talbot | 27 | 36,450 | 15 | 7,500 | 28,950 |
| Washington | 169 | 228,150 | 149 | 74,500 | 153,650 |
| Wicomico | 169 | 228,150 | 123 | 61,500 | 166,650 |
| Worcester | 42 | 56,700 | 37 | 18,500 | 38,200 |
| Total | 16,035 | $21,647,250 | 12,640 | $6,320,000 | $15,327,250 |

Note: Amounts do not include limited English proficiency funding under the Baltimore City school legislation (SB 795 That legislation includes funds based on removing the 2 year cap on inclusion of students in the count. This is also a feature of the TIP proposal.

Prepared by the Department of Legislative Services, January 1998

## Extended Elementary Education Program (EEEP)
### Targeted Improvement Program
### Fiscal 1999

| County | Existing Sites | New Sites | Total Funding |
|---|---|---|---|
| Allegany | 22,541 | 35,000 | 57,541 |
| Anne Arundel | 95,241 | 105,000 | 200,241 |
| Baltimore City | 589,491 | 105,000 | 694,491 |
| Baltimore | (4,241) | 105,000 | 100,759 |
| Calvert | 38,029 | 105,000 | 143,029 |
| Caroline | 16,770 | 35,000 | 51,770 |
| Carroll | 14,270 | 0 | 14,270 |
| Cecil | 57,011 | 105,000 | 162,011 |
| Charles | 74,439 | 70,000 | 144,439 |
| Dorchester | 70,036 | 0 | 70,036 |
| Frederick | 40,082 | 140,000 | 180,082 |
| Garrett | 36,312 | 0 | 36,312 |
| Harford | 34,311 | 140,000 | 174,311 |
| Howard | 2,500 | 70,000 | 72,500 |
| Kent | 20,541 | 35,000 | 55,541 |
| Montgomery | 103,759 | 210,000 | 313,759 |
| Prince George's | 126,226 | 210,000 | 336,226 |
| Queen Anne's | 24,426 | 35,000 | 59,426 |
| St. Mary's | 191,134 | 70,000 | 261,134 |
| Somerset | 39,729 | 0 | 39,729 |
| Talbot | 20,541 | 0 | 20,541 |
| Washington | 33,416 | 70,000 | 103,416 |
| Wicomico | 22,541 | 0 | 22,541 |
| Worcester | 16,656 | 35,000 | 51,656 |
| Unallocated | | | 1,000,000 |
| Total | $1,685,761 | $1,680,000 | $4,365,761 |

Prepared by the Department of Legislative Services, January 1998

## Teacher Development Program
### Targeted Improvement Program
### Fiscal 1999

| County | Number of Schools | $8,000 Per School | Total Funding |
|---|---|---|---|
| Allegany | 24 | $192,000 | $192,000 |
| Anne Arundel | 29 | 232,000 | 232,000 |
| Baltimore City | 174 | 1,392,000 | 1,392,000 |
| Baltimore | 73 | 584,000 | 5,584,000 |
| Calvert | 1 | 8,000 | 8,000 |
| Caroline | 8 | 64,000 | 64,000 |
| Carroll | 6 | 48,000 | 48,000 |
| Cecil | 10 | 80,000 | 80,000 |
| Charles | 12 | 96,000 | 96,000 |
| Dorchester | 9 | 72,000 | 72,000 |
| Frederick | 10 | 80,000 | 80,000 |
| Garrett | 15 | 120,000 | 120,000 |
| Harford | 16 | 128,000 | 128,000 |
| Howard | 3 | 24,000 | 24,000 |
| Kent | 7 | 56,000 | 56,000 |
| Montgomery | 71 | 568,000 | 568,000 |
| Prince George's | 136 | 1,088,000 | 1,088,000 |
| Queen Anne's | 4 | 32,000 | 32,000 |
| St. Mary's | 12 | 96,000 | 96,000 |
| Somerset | 9 | 72,000 | 72,000 |
| Talbot | 6 | 48,000 | 48,000 |
| Washington | 25 | 200,000 | 200,000 |
| Wicomico | 16 | 128,000 | 128,000 |
| Worcester | 10 | 80,000 | 80,000 |
| Total | 686 | $5,488,000 | $10,488,000 |

Note: Baltimore County's amount includes $5 million for the Pilot Teacher Mentoring Program, $2 million of which is budgeted in the Challenge Schools Program.

Prepared by the Department of Legislative Services, January 1998

# Appendix 3

# MARYLAND STATE DEPARTMENT OF EDUCATION GUIDELINES FOR THE DEVELOPMENT OF A SCHOOL IMPROVEMENT PLAN

*The School Improvement Plan will cover a one year period from July 1 through June 30 of the following school year.* ***The plan should build on previous strategies and activities that have been implemented and provide specificity on how the school will continue to operate over the next twelve months.*** *The following elements should be included in the 1998-1999 plan:*

**I. Table of Contents**

**II. Executive Summary** (school's name should be at the top of the first page)

This section should include the following:

- ❑ a brief school history,
- ❑ demographics,
- ❑ discussion of school priorities,
- ❑ list of school goals, and
- ❑ synopsis of major initiatives in the action plan.

**III. Glossary of Terms**

The glossary of terms should include a description of all acronyms used in the plan that are school or school system specific.

**IV. Vision**

**V. Mission and Philosophy**

**VI. Evidence of Need**

This section should include updated/revised accurate data reflecting curriculum audit adjustments as well as the December 1997 report card and should expand upon the information provided in previous plans. Provide a complete analysis of the data to determine contributing factors and implications for school improvement. Data should be provided on the following areas:

- ❑ school profile (including brief information about the community)
  - ◆ describe how the school is organized for its instructional program (i.e., teams, grade level, houses, academies, other specialized grouping)
  - ◆ provide a description of the school's 1998-1999 projected staffing,



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including the administration

- ❑ school demographics
- ❑ student mobility data
- ❑ students receiving special education services
- ❑ results from curriculum audit(s)
- ❑ MSPP disaggregated data
- ❑ instructional program
  - ◆ brief description of content area instructional program
  - ◆ use of technology
  - ◆ need for staff development
- ❑ school climate
- ❑ suspension/disciplinary data
- ❑ parent/community involvement.

## VII. Overview of Priorities

This section defines the school's focus based on the evidence of needs and will bridge the goals and the action plan.

## VIII. Statement of Goals

This section should list school-specific goals that are clear and measurable with start and end dates. Goals should be based on priorities.

## IX. Transforming the School

- ❑ Describe the instructional program. Specify how identified instructional programs will be implemented in the classroom.
- ❑ Describe how technology will be used to support the instructional program.
- ❑ Identify specific staff development training planned for the 1998-1999 school year. Describe how staff development topics relate to the needs of the school and how the outcomes will be assessed. This narrative should align with the action plan and staff development calendar.

## X. Working Within the Local System

In accordance with the effective schools process, the efforts of the superintendent and other district administrators are critical in supporting school improvement. A common focus, or

mission, should be evident with all system-level staff development and resource management supporting that mission. This section should include the following:

- a description of how the school is accessing support systems from the central office level in order to implement its plan. It should address specific school needs and how the central office is supporting, or expected to support, the school in addressing those needs.
- system-wide professional development activities in which the principal and other school leaders will participate and an indication of participation by school staff to date.
- a description of the role of central office support personnel and curricular materials that will be made available at the system level to support restructuring efforts.

## XI. Action Plan

The action plan should be tied to specific identified needs (section VI) and priorities (section VII). It should be realistic with enough specificity to describe how the activity will be accomplished. Schools are expected to adjust goals and objectives based on 1997 MSPP results.

- **Goals**— should be for three to five years based on school needs and priorities. They must be measurable with start and end dates.
- **Objectives**— generally cover one school year. They must be measurable and relate to the goal. Use "from" and "to" statements.
- **Milestones**— measure progress toward the objective during specific intervals, i.e., monthly, quarterly, etc. They must be measurable and relate to the objective. "Administrative" activities are rarely adequate as a milestone.
- **Evaluation**— must be measurable and related to the objective.
- **Strategies/Activities**— taken as a whole, must include instructional improvements for all students in all grade levels. Examples of other strategies might include how technology will support instruction, address lesson design, use of the media center, and links with supplemental student activities. The time lines for the activities should have realistic start and completion dates. An individual should be identified with an asterisk as having lead responsibility for each activity. Activities need the necessary specificity to convey the "what" and the "how" for those who will be implementing the activities.

## XII. Management System

This section should identify the activities/tasks to be accomplished by the school each month, the person(s) responsible for implementing and *monitoring* activities at the school, the instruments

used for internal monitoring, and how internal monitoring information will be shared with the school improvement team and other stakeholders.

### XIII. Staff Development Calendars

Staff development is a continuous process and should build on the previous training sessions. The school should provide copies of previous staff development calendars. The calendars should have dates, activities, presenters, targeted audience, and desired outcomes. If a cadre from the school is being trained, the staff development section should indicate how and when this information will be shared with other relevant staff members and what follow-up activities are planned. Training used should be linked to content area instruction whenever possible.

### XIV. Budget

The budget section should document how money will be spent. The school should focus on its local budget and other grants that may be available for school improvement.

### XV. School Improvement Team Roster and Signature Sheet

The name of each member of the school improvement team should be typed, then signed on the signature sheet.

# Appendix 4

# THE CORPORATE PARTNERSHIP FOR MANAGERIAL EXCELLENCE

Occasional Paper #16

George R. Kaplan
March 1997

**Prepared by:**

**The Institute for Educational Leadership, Inc.**

## PREFACE

The Institute for Educational Leadership (IEL) is pleased to disseminate this Occasional Paper to its network of educational policy makers and friends throughout the country. The Corporate Partnership for Managerial Excellence (CPME), described by veteran education reporter George Kaplan, is a unique kind of school-business connection.

The CPME since 1993 has worked in Montgomery County, Maryland to help improve the performance of the non-academic support operations which service the county's large (122,000 students) school system. Mr. Kaplan in the following pages describes a rather special school-business pairing which is unique in several important respects.

CPME is a partnership which includes a number of companies (both local and national) which are based in a large, nationally visible and increasingly heterogeneous suburban community. Unlike so many school-business partnerships which are built upon the involvement of a single company, CPME includes a range of diverse private firms which are strategically matched and teamed to accomplish the Partnership's mission.

CPME's emphasis on sustained long-term involvement and exclusive focus on the non-academic components of school management also make it a rather special partnership.

We believe that Mr. Kaplan's case study of CPME will provide useful insights to other school systems and companies interested in building partnerships which capitalize upon the special expertise and commitment of business leaders to school improvement.

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Michael D. Usdan
President
Institute for Educational Leadership
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# THE CORPORATE PARTNERSHIP FOR MANAGERIAL EXCELLENCE

## A Unique Kind of School-Business Connection

*In Montgomery County, Maryland, from 1993 to 1996, a unique business-school connection, the Corporate Partnership for Managerial Excellence(CPME), undertook to help improve the performance of the non-academic support operations of the county's 122,000-student, $900- million school system. Senior employees of 16 county-based firms collaborated with upper-level administrators from Montgomery County Public Schools(MCPS) in 11 peer-to-peer teams that recommended 125 changes in the system's administrative, logistical, and planning operations. Unlike other school-business pairings that dissolve after issuing a well-publicized call to action, the CPME remained committed to helping the school system carry out its recommendations. At virtually no cost and considerable potential savings to taxpayers, MCPS has continued to receive top-quality technical assistance, while relations between the school system and senior corporate officials, some of them from the nation's most respected companies, have deepened in mutually satisfactory ways.*

### A Neglected Issue

The endless "Great Debate" about America's public schools has centered almost exclusively -- and understandably -- on whether the nation's children are getting a "world class" or even a decent education and, if they aren't, what ought to be done about it. With 81,000 public schools in 15,000 districts responsible for the schooling of 46 million students

by 2.6 million teachers -- and given the nationwide perception that the country's schools should do better -- there is no lack of pressing educational topics to dominate the critical attention of responsible citizens.

Yet some important school-connected issues somehow elude the intense public scrutiny they clearly warrant. High on this list is the domain of non-instructional supporting services that school systems must deliver efficiently and economically to buttress what happens in the classroom. Regrettably, though, analysts and critics of public education's travails often appear unconcerned and largely uninformed about such seemingly routine "second-tier" matters as data operations, transportation, finance, facilities management, or food services, among others that can sway a school system's overall performance. School reformers and the communications media often prefer to feed instead on the "raw meat" stories of violence, drugs, teen-age pregnancy, or lagging academic performance that are so frequently theirs for the asking. When, as happens from time to time, an account of ineffective or even corrupt financial management surfaces, it is ordinarily quickly disposed of or referred to the courts. Although, to take a fairly typical example, the General Accounting Office of the U.S. Congress and the Education Writers Association have produced well-documented reports on the perilous condition of aging school buildings across the country, there have been few sustained public cries for action to repair or replace decaying 100-year-old structures that are a daily threat to the security and well-being of children. The subject finally received appropriate attention when President Clinton brought it up in his 1997 State of the Union address.

In an era of fiscal belt-tightening by public agencies across the country, most school

systems have had to make do with shrinking, static or only very slightly increased budgets. But within those appropriations, the urgency of improving academic performance has frequently led to "robbing Peter to pay Paul," that is, of hiking allocations for classroom learning, the obvious core mission of public education, at the expense of the top-quality supporting services that a well-managed school system must have. To the stakeholders of public education -- students, parents, elected officials, the larger public, employers, and, increasingly nowadays, business and the mass communications media -- this is a "no brainer." The children and their teachers must have first call on every school system's resources. Everything else is, or ought to be, secondary.

In practice, however, this elemental truth cannot be an absolute. Stretching the non-academic budget dollar too far can have distinctly counterproductive outcomes for children. Sorely needed classroom supplies, including computers and up-to-the-minute instructional materials, may arrive too late to be useful or may not be what was ordered. Slipshod maintenance of school buses by poorly qualified mechanics clearly endangers students' security, even their lives. Cumbersome administrative practices and regulations can make a hash of what ought to be speedy, uncomplicated personnel actions. The list of distracting, even negative, possibilities is endless.

Sad to say, many of the logistical support arrangements that undergird classroom learning in the mid-1990s bear an eerily close resemblance to those of the plodding, procedure-bound bureaucracies of an earlier time. In far too many of the nation's school districts, administrative and logistical support departments are not the streamlined, quick-responding, visionary bodies they ought to be. They customarily lag far behind their

private-sector neighbors in upgrading their managerial styles and procedures. Indeed, in their overall approach to running multimillion-dollar enterprises. In varying degrees, complications arising from this state of affairs can affect even the most forward-looking school systems, including the country's 17th largest and arguably one of the all-round best: that of Montgomery County, Maryland. The story of how this 122,000-student public school district teamed up with county-based businesses and non-profit agencies to help modernize its vital support functions may offer useful insights to communities vexed by similar problems.

## The County

By most criteria, Montgomery County, Maryland, embodies most of the virtues and values of a well-endowed American community. In today's vernacular, much of it is a typical "edge city," bordering the nation's capital city and boasting a mostly prosperous population of over 800,000. With its median annual household income in the $60,000 range and houses selling for an average of roughly $200,000, Montgomery County is no longer heavily dependent, as it was for many years, on neighboring Washington, D.C. for much of its professional, commercial, and cultural sustenance. Since the early 1980s it has become a formidable force unto itself with a 495-square-mile jurisdiction of urban, suburban, and exurban living that contains an enviable mixture of high-tech and science-oriented firms, headquarters of several Fortune 500 companies, largely recession-resistant federal agencies, and above-average social services and community facilities.

But there is no real sense of shared destiny among these components. Even after the arrival of the Washington area's excellent public transportation Metro system, Montgomery County remains a rambling collection of unconnected parts. Its principal unifying force, almost by default, is its $6,800 per student schools, not its political leadership or the national business headquarters, professional groups, and federal agencies based there. The five-days-a-week, nine-to-five presence of some 45,000 employees of such huge bodies as the National Institutes of Health and key agencies of the U.S. Departments of Energy, Commerce, Health and Human Services, and Defense, and others, is a mixed blessing; some of these federal institutions have been less than gracious or cooperative neighbors.

Scattered and non-centered though the county may appear, its statistics nevertheless

command respectful attention, none more strikingly than those that concern education. More than 27 percent of the over-25 population have earned graduate degrees, a total that puts the county in a rarefied zone of educational attainment, while only eight percent have failed to finish high school. If any single quality can be said to define Montgomery's residents, it is a nearly obsessive population-wide esteem for education -- at all ages and levels.

As is the case in many "edge cities," Montgomery County's population is both expanding and diversifying, and the task of blending recently arrived immigrants and minority group members into the county's "good life" and educational system is a continuing high-priority worry. Although the county is still slightly over 70 percent white, that percentage has plummeted from the 90 percent of 20 years ago, while the overall population has risen by 30 percent. The school population, which until recently was overwhelmingly white, is now 20 percent African-American, 12.5 percent of Asian or Pacific Island origin, and 12.5 percent of Hispanic background.

In rating Montgomery County as a place in which to live and work, national professional business organizations and journals consistently cite the high quality of its public school system. This reputation is richly merited. More than 75 percent of its young products go on to college, while an additional 15 percent enroll in some form of specialized or post-graduate training. By the criteria of the most widely acknowledged measure of academic achievement, the "recentered" Scholastic Assessment Test (SAT) with its national averages of about 500 each for the verbal and math sections, Montgomery County's scores of 538 and 550, respectively, for the 1995-96 school year (in which three-fourths of its high school seniors participated in the test) rate among the nation's highest for a jurisdiction of its size.

In a typical year the system produces an enviable average of 40 National Merit Scholars, several Presidential Scholars and 20 semifinalists, and several of the "Top Ten" winners of the Westinghouse Science Talent Search.

**Premises and Processes**

Viewed from afar, the Corporate Partnership for Managerial Excellence appeared to be a straightforward, uncomplicated effort by 11 teams of experts from locally-based corporations and key staff members of Montgomery County Public Schools(MCPS) -- a kind of harmonic convergence, as it turned out -- to improve the delivery of logistical and administrative support services to schools, teachers, and students. Although the MCPS performance in these areas was generally judged to be responsive, even the friendliest of observers had long believed that some operations were still emerging from the managerial dark ages of the 1950s and that the overall quality of services needed upgrading and a few well-targeted doses of real-world perspective. As the CPME put it, MCPS was still "saddled with cumbersome processes driven by short-term objectives requiring multiple reviews by elected officials.... because procedures established decades ago are still being used to manage a school system that has, over the past ten years, doubled its budget..."

The central premise of the designers and organizers of the CPME -- a well-placed county lawyer, the chair of the County Council's education committee, and assorted interested businesspeople -- in the fall and winter of 1992-93 was that school administrators needed "to follow the lead of the private sector to become more effective with limited resources." At ground level this meant abandoning or drastically revising entrenched ways of doing things, adopting a customer-driven, "bottom line" emphasis on the principles of the Total Quality Management(TQM) movement that was sweeping through the nation's business community at the time, and striving for "continuous improvement in quality, cost, lead time, and customer service" -- all of them strongly held tenets of effective business organizations.

From its earliest days, the CPME recognized that the politically safe year-to-year approach to financing the school system, especially at a time of tightening purse strings, would be a major deterrent to accomplishing much of what its members knew had to be done. At the least, as had been demonstrated repeatedly, it would almost certainly inhibit MCPS's ability to invest in sorely-needed technology and operating systems.

These propositions, as well as the corporate belief system that accompanied them, found no disagreement within the CPME or, perhaps more significantly, the Montgomery County Public Schools. The system's key administrators, expressly including Superintendent Paul L. Vance, whose solid backing was pivotally important as the CPME's work progressed, were ready to sign on and open their books. Many of their own efforts to modernize the system's support functions and run them like a successful business had almost invariably -- and inevitably -- encountered political barriers, principally in an unwillingness by elected officials to approve investments beyond one year or, indeed, much long-range planning at all, at a time when public expenditures were under unrelenting attack. With lean budgets and tight restrictions on hiring new non-academic employees, the system had precious little leeway in pointing toward long-range improvement.

In this atmosphere, the school system's leaders reasoned, bringing in volunteers from the county's most prestigious corporations (and one well-managed non-profit) as suggested by the County Council and Board of Education, might be a way to put some muscle behind efforts to shake things up and, perhaps equally important, to get some top-grade state-of-the-art consultative help gratis. The firms that would become CPME partners were obviously production- and service-oriented, and all were experienced practitioners of the noble art of

balancing the imperatives of profits, investment, quality, and research. Substitute "outcomes" for "profits", and these become the linchpins of a thriving school system of the 1990s.

The CPME had no formal organizational structure nor, beyond requesting findings and recommendations for a report to be issued by September 1993, did it impose a modus operandi on participants. Instead, it started out guided by several essential, non-negotiable principles that constituted a kind of informal but rigorously observed operational code. Though never spelled out explicitly, these basic understandings were respected throughout the life of the CPME:

- Cooperation and equality were fundamental to every phase and activity of the CPME. The business members of the paired 11 teams (drawn from MCPS and 16 firms) were not treated as intruders or everyday outside consultants; they were a superb asset for which school leaders were grateful. All contacts were carried out between equals on a peer-to-peer basis. Solutions and possibilities were set forth by the teams and not by the business or MCPS "side." Although most of the team members occupied executive-level positions in MCPS or their firms, they participated as collaborating professionals in a merged endeavor.

- Labeling and scapegoating were out. Questions of blame or credit for what was happening in MCPS were irrelevant. Nothing in the CPME's work was meant to provide grist for catchy headlines about "crumbling infrastructures" or "bloated bureaucracies." The system's administrative and logistical operations were already in working order. The task of the CPME was to make them function better, not to finger competent, hard-working MCPS employees.

- The CPME did not tell teachers or principals how to do their job, nor was it involved in curricular matters. It only occasionally even mentioned children.

teachers, or classrooms. Its clearly delineated mission was to help improve the administrative apparatus that supported them. Although some areas of concern such as technology application were of obvious interest to school leaders, they were presented in nearly all cases primarily as logistical support matters.

- School and business participants alike acknowledged from the outset that significant cultural differences in organizational goals and operational practice would always exist. A "bottom line" emphasis is not always consonant with the people-oriented thrust of a public education system -- and, of course, vice versa. Because the apparent disparities in outlook were ventilated and accounted for early in the CPME's work -- and because MCPS held nothing back -- they never became a divisive issue. (Indeed, many lasting professional and personal friendships emerged from the CPME's work.)

- Throughout its four-year life, the CPME was to be resolutely non-political, non-ideological, and non-threatening. There were no auditors, inspectors, or progress monitors, and no "outside" bodies (school board, county council, county executive, PTA, corporate boards, company presidents, et al.) were to be involved in overseeing or monitoring the CPME's efforts, at least until they appeared on the screen as desirable MCPS policies or actions.

- The CPME was not to be a temporary, single-shot, blue-ribbon commission that would sweep quickly through the system, take it to task publicly in a critical report, and disband to the acclaim of editorial writers and a grateful citizenry. It was conceived -- and performed -- as a working partnership that would be less concerned about political fallout than about recommending and then shepherding needed changes throughout the non-academic sectors of MCPS.

- The CPME's recommendations would not be binding, but they would surely carry weight in MCPS's dealings with the Board of Education and other governing bodies.

**The Report**

On September 30, 1993, the CPME unveiled its precedent-setting 374-page report, "Investing in a Commitment to Quality: A Report of the Corporate Partnership on Managerial Excellence in the Montgomery County Public Schools," that laid out clearly (and in sometimes stupefying detail but without corporate jargon or educationese) what its business-school teams believed needed to be done. The product of thousands of hours of exhaustive interviews, analysis, and on-site research and consultation, "Investing..." contained no less than 125 recommendations embracing broadly stated needs for: (1) properly executed long-range strategic planning; (2) revisions to the budget process to accommodate multiyear investments and to project "life-cycle costs"; (3) automation and an urgent need for the increased use of state-of-the-art technology throughout the system; and (4) reductions in duplicative reporting requirements.

The need for progress in these areas doubtless exists throughout public education in America. But they are too rarely set forth publicly as high priorities for school systems and seldom, if ever, as all-encompassing themes of school-business relationships.

The report received heavy public exposure complete with a well-attended and thoroughly reported press conference, appearances on radio and television by key CPME participants, numerous editorial think pieces in county newspapers, and generally fulsome endorsements across the political and institutional spectrum. Most of the media's coverage was positive but also provocative in demanding that the school system shape up and confront the realities of the times in which it was functioning. Almost predictably, though, the CPME's carefully phrased and essentially non-judgmental document was also greeted with

such headlines as "From Trouble to Crisis," "Report Rips Montgomery Schools," "Outdated System Strangles Schools' Bottom Line," and, in The Washington Post, "Schools Scolded for Old-Time Management."

Such sensationalism goes with the territory, and the CPME's participants and supporters were sufficiently battle-hardened to know how to take it in stride. One inaccurate impression that persisted, however, was a strongly held belief that the CPME was a business-run and -staffed venture. No amount of conclusive evidence that school people were genuine partners throughout the endeavor could fully dislodge this perception, with the result that, years later, county-based businesses were still being perceived as the only players in the CPME and the sole authors of everything in its landmark report. While it is true that the business "side" (volunteers from the original CPME companies augmented by several others) drafted "Investing..." ( and did it gratis!), school personnel were deeply involved at every stage of each team's efforts. They provided vital information and unlimited access as well as operational savvy and institutional memory, the latter an asset that is too often overlooked in assessments of an organization's performance and prospects. None of the 11 individual sections of this landmark report went to press without sizable contributions from the school system's CPME participants.

The unsurprising, oft-repeated motif of the CPME analysis was that, at a time when businesses are restructuring for more efficient and cost-effective performance, MCPS, like many other public entities, has been unable to "streamline its operations as much as it should because it is saddled with cumbersome processes driven by short-term objectives requiring multiple reviews by elected officials." The county's taxpayers are, in a nutshell, "not getting

the best value for their tax dollars, in part because procedures established decades ago are still used to manage a school system that has, over the past ten years, doubled its budget..."

This theme pervades the 125 recommendations. From it comes a clear signal that even in a system with a dropout rate of 1.9 percent and with 94 percent of K-6 parents satisfied with their children's schools, a comprehensive modernization of this nearly one billion-dollar enterprise was nonetheless overdue. Equally pervasive, implicitly if not always spelled out, is an underlying hypothesis that American business can be depended upon to prescribe workable remedies for the managerial and operational ills that afflict the management of today's public institutions. This premise has yet to be tested extensively in public education, but the readiness of the quite sophisticated Montgomery County school system to back and, eventually, to adopt an overwhelming majority of the CPME's bluntly stated recommendations surely speaks well of this particular group's expertise and perspicacity.

Less than two months after the report's appearance and mostly warm reception, Superintendent Vance submitted 33 pages of item-by-item responses to the Board of Education. Each of the CPME's 125 recommendations received one of six classifications: fully implemented(13), partially implemented(32), implement at no or minimal cost(16), implement at high cost($25,000-plus) (14), further study(37), and do not implement(13). Although there appeared to be no systematic methodology for rating these recommendations as to importance, priority, and cost, it was evident from the warmly supportive tone of the superintendent's report that every word of "Investing..." as well as its compelling overall message had been carefully and thoroughly absorbed.

Parts of the CPME's report appear to be slightly altered and localized replays of many of the reports on school reform of the 1980s. Some sections echo the main messages of "A Nation at Risk," the hard-hitting 1983 critique of public education by a Reagan Administration-appointed commission -- but without its apocalyptic and accusative tone. While no set of recommendations by any one of the 11 teams towers above the others -- all proffer cogent insights and advocate achievable goals -- several topics command special attention because they have important system-wide ramifications

In structuring the Corporate Partnership, its originators may have unintentionally underrated what has become a national imperative for governmental and public service organizations, in most cases long after successful corporations had recognized and acted on it: installing new technologies while upgrading and applying existing ones to better effect. This may have become a tired truism, but not in most school systems. So insistently did this theme recur in the work of nearly all of the original 11 groups that a new team, Instructional Technology (IT), was established, superseding the original Data Operations group, to analyze MCPS's situation and requirements in this crucially important domain. Contained in a November 1994 status report on the CPME's work, the IT panel's 11 pages of findings constituted a draft blueprint for action, both in support services and the classroom.

To an outside observer, the reconstituted IT team's review might appear to be a belaboring of the obvious, with such items in its catalogue of "musts" as developing an intensive, system-wide approach; making professional help immediately available to users; developing a methodology for key management processes; procuring equipment on a "well-considered, life-cycle cost basis": investing in IT training for teachers (an area in which

public education has been inexcusably parsimonious); and planning strategically on a multiyear basis (an underlying concept in almost all of the CPME's work). These and related other recommendations had been high on the agendas of key school officials for several years. Seeing them restated with persuasive endorsements from a group as prestigious as the CPME was to be a potent catalyst for getting some action. The work of the IT team also -- and importantly -- helped to elevate IT as a stronger force in managing this nearly one billion-dollar enterprise. A senior post of associate superintendent was created to oversee IT, both in bolstering support services and in MCPS's various programs to provide global access for all 181 schools and 122,000 students and their teachers.

Strongly reinforcing the IT segment's suggestions was a detailed, closely linked component of "Investing..." setting forth the strategic planning challenges MCPS should address -- in some cases urgently. This section was prepared by Paul Blumhardt, the Director for Strategic Research of Lockheed Martin (the Montgomery County-headquartered global behemoth of aerospace technology, military aircraft, missiles, and systems engineering), after extensive consultations with MCPS officials, representatives of IBM Federal Systems Company, and David Pearce Snyder, a nationally respected consulting futurist and county resident. It contained 38 recommendations based on a holistic analysis of the daily links between student performance and the services required to enhance it. Unsurprisingly, it pushed hard for such features of a long-range planning effort as a greatly expanded use of modern information technologies, closer ongoing ties with business, and a strengthened planning mechanism facilitated by a management training program of the type larger corporations have long since developed -- and which public organizations usually

relegate to the "expendable" sections of their budget submissions.

As they interviewed the system's administrators and studied the MCPS books, the teams repeatedly found entrenched procedural practices that were ripe for modernization. Each team worked independently and had its own informal ground rules and participation patterns, but the end results clearly revealed problems and perhaps an organizational mentality common to most parts of the system. A few, of many, random examples, large and small:

- The procurement operation had been using a 100-step process based on a long and, by contemporary standards, clumsy flow chart. It processed 60,000 purchase orders annually by hand, using a nine-part form and filing each item three times. After two years of extensive analysis and hard work by experts from the Bechtel Corporation and MCPS, what had been a 150-key stroke per procurement procedure was reduced to eight key strokes, and the status of any procurement action could be determined instantly.

- Working closely with its MCPS partners, the county-based Howard Hughes Medical Institute, the nation's largest, non-governmental (and non-profit) medical research organization, found that the MCPS personnel operation was a Rube Goldberg contraption of manual, semi-automated, and automated functions, "vulnerable to failure and error...heavily dependent on human intervention." The system's salary and employment records were maintained on some 16,000 index cards, a process that was nevertheless preferable at the time to the alternative, the "cumbersome, outdated electronic system" that was then available and would almost certainly have to be replaced soon. Overall, said Georgia Johnson, then of Hughes, there was a pressing need to retool the entire personnel apparatus with up-to-date technology that would eventually yield huge savings. In the meantime, the Hughes-MCPS team was monitoring and assisting in implementing its initial recommendations.

- Within a year of its release, the CPME report's call for upgrading and modernizing the payroll system led to direct action with the installation of on-line time and leave reporting for permanent employees. This action reduced the massive manual posting process, improved the accuracy and timeliness of reporting, eliminated two-and-one-half positions, and yielded annual savings of salaries and benefits of almost $100,000.

- The transportation team analyzed the system's routine practice of keeping school buses in service beyond 12 years and found that MCPS could save one million dollars per year in operating and owning costs by retiring them at the 12-year mark. The 12-year cycle was endorsed by the Board of Education and was implemented almost immediately. This team usually met early in the day and evenings for six months. It found room for improvement in nearly all areas of transportation. Three years later, said Wayne A. Mills of Washington Gas, a former president of the Maryland Chamber of Commerce, computerized routing had finally been installed along with numerous changes in operating procedures. But the linkage between operations and capital spending was still not all it should be.

- All four of the recommendations of the food and nutrition services team were accepted and on their way to early implementation. One of the most drastic (for MCPS), pilot-testing a debit card system for all food service sales to students, was tried successfully in a number of schools. When it turned out that all of the cards in one school had been lost, damaged or otherwise disposed of, a keypad system was substituted and installed in several schools. Guest Services, Inc. was the business partner on this team.

- Communicating with MCPS was often difficult for Montgomery County residents and others. Acting on recommendations of the CPME, MCPS installed an automated telephone system to relieve and route excessive telephone inquiries into the Department of Information and set up a "crisis communications plan as an adjunct to

an operations plan." An outside company contracted to supply fully automated voice mail for individual phones and touch-tone direct routing of telephone inquiries to designated departments.

Taken singly, cases such as these are hardly revolutionary (especially the installation of long-overdue voice mail and touch-tone routing). They appear in many instances to be commonplace actions that would surely have been recommended by MCPS itself. But add them to 100-plus others drafted by and/or bearing the endorsement of leaders of Montgomery County's formidable business community as part of a system-wide reform effort, and they can no longer be treated as expendable or postponable items in a school system's operating or capital budget.

**The Leadership Factor**

Launching an initiative of the scope of the Corporate Partnership for Managerial Excellence demanded that its key players possess a broad array of organizing and negotiating skills as well as an accurate reading of the county's volatile political and bureaucratic ambiance. Crucially important, too, was the ability of its planners to persuade some of the participants, in this case the top managers of the school system's support services, that their interests and professional capacities would be respected and put to good use throughout the life of the CPME. Even with these factors in place, the often-overlooked matter of timing loomed large in getting the CPME off the ground. What was the potentially most auspicious and least threatening time for starting up? How, when, and under what circumstances and whose auspices should the CPME get going?

What began as a seemingly foolproof concept -- importing experts from business to help make the non-academic departments of this "edge city's" school system function with maximum effectiveness -- could never have been launched without strong but non-ideological leadership. Especially in its early stages, the CPME would require the guiding hand of someone thoroughly familiar with large educational systems and capable of mobilizing the appropriate resources of the growing community of county-based business firms. This person would also need to enjoy good access to the news media (and a sure sense of how to deal effectively with them) as well as sufficient status to relate as a peer to the seven-member (plus one non-voting student member) school board and the highly political nine-member County Council -- two elected bodies that sometimes seem to compete more than cooperate. (Montgomery County is hardly unique in this: the record of

cooperation between school boards and elected officials of civic government has always been spotty.)

That one such person was prepared to give literally hundreds of sharply focused hours creating and masterminding this project was perhaps its strongest asset in the CPME's formative days. As a civic-minded lawyer, political bridge-builder, and former chairman of the school board for the State of Maryland, Lawrence A. Shulman, the CPME's real founder, motivator, and catalytic force, had long been a key actor at the policy levels of education in the area. In the 1970s he had been the moving force behind trail-blazing (for Montgomery County) school-business collaborative projects to build houses, repair cars, and run retail stores, and he had become an ardent advocate of the notion that business had much to share with public schools, Shulman had also absorbed the lesson that the higher the level of participation and endorsement by business interests, the more likely it would be that companies would contribute meaningfully and maintain a serious long-term commitment to an endeavor such as the CPME. This dictum was brought home forcefully at an organizing meeting over breakfast in an IBM headquarters building in Gaithersburg, Maryland, in the fall of 1992, when representatives of 15 firms first discussed the possibility of creating an organization such as the CPME.

From the earliest days of the CPME Shulman underlined the continuing need for mutual trust and an approach that would stress improving the quality of school support services without threatening managers and staffs. Quietly and gradually, he and his principal allies in both camps set about assembling the parts of the new enterprise. Wisely, they resisted the temptation to create a formal organization that might founder on the rocks

of authority, hierarchy, and other perils. Functioning as both an organizer and a goad to corporate conscience, Shulman proposed a kind of informal collaborative endeavor that would do a necessary job while improving corporate images (and, eventually, their bottom lines) and make everyone involved feel better about life in Montgomery County. If a company decided that one or two employees would suffice, that was what they contributed. At the other end of the participation scale, NationsBank appeared with a team of 20 while others designated five or six senior staffers. There was no set pattern. Some CPME participants gave many hundreds of hours; others, much less. In some cases, it became an obsession, devouring weekends, vacation time, and, if a firm's policy permitted, chunks of company time.

Despite the enormity of the task and the possibility that, like other boards across the country, the Montgomery County Board of Education might tend to micromanage implementation of the CPME recommendations, Shulman set about creating teams that made sense and would have real clout. It was not engraved in stone, for example, that a stock brokerage's CPME participants had to work on financial management or that a utility's representatives would be destined for the facilities management team. Assignments were made on the basis of individual talents and specialties and the expressed interest of individual companies rather than simply on the firms' specialties. Thus, the contribution of the electric utility, Potomac Electric and Power Company, was to the team for communications and marketing, while six professionals from Discovery Communications, Inc., the operator of the national cable television channel among other interests, worked with five peers from Ferris, Baker Watts, Inc., a leading regional brokerage firm, on the educational accountability team.

**Lessons**

From its inception and almost across the board, the CPME was a conspicuous exception to the commonplaces that characterize most school-business connections. In sharp contrast to "partnerships" that are far too often single-shot, publicity-dominated exercises in mutual back-scratching by "here today, gone tomorrow" letterhead panels, the arrangement between Montgomery County's school system and the county-based business firms that comprised the CPME opened for business with real substance and a set of focused, carefully considered objectives. Of its many shared values, none was more faithfully observed, or more rarely encountered, than the two-way understanding that this authentic school-business partnership -- and the participating firms' commitments of time and expertise -- would last until its tasks were completed or well on their way to full implementation.

These factors are unique in this era of greatly heightened school-business collaborations. Four years into its operations, with relations between participating businesses and MCPS displaying staying power unique to this kind of enterprise, the CPME's organizers and participants created a permanent successor organization, Montgomery SUCCESS, Inc., a 501(c)(3) (nonprofit) body, to continue and refine the CPME's work in six areas: mid-management effectiveness, process improvement, communications, staff development, strategic planning, and finance. Some of the CPME's key business members stayed on to join or help form Montgomery SUCCESS, while numerous additional companies -- among them several high-tech firms, a regional newspaper chain, a large private hospital, two realty companies, Coopers and Lybrand (the management and accounting giant), and the largest supermarket chain in the area -- signed up to join MCPS as

members of the six new teams.

Although the majority of the nation's 15,000-odd school districts, including that of Montgomery County, have developed various kinds of connections to local and national businesses, the CPME never conformed to the stereotypes to which we have become accustomed. Studies of school-business links usually describe these readily identifiable models: (1) donations by business of equipment, grants for teachers, and volunteer subject-specific specialists and mentors; (2) enhanced opportunities for students to learn, most often in science and technology, career preparation, reading, and other specialized areas; (3) compacts and collaborations that connect schools and firms that are interested in school reform; and (4) "reform by commission," in which business leaders and their national organizations produce much-publicized exhortations for schools to shape up. In recent years, some businesses have also looked to education as a greatly expanded money-making opportunity through privatization, private school choice, and product promotion via Channel One (the for-profit TV news program beamed to secondary schools) or other means.

By the early 1990s it had become almost axiomatic that, aside from a handful of socially "progressive" firms (Ben and Jerry's, Patagonia, Body Shop, StrideRite, Tom's of Maine, Levi Strauss, and Stonyfield Farms are among those most frequently mentioned), corporate contributions to public institutions and causes, while nearly always welcome, are something less than acts of pure philanthropy. They can, in fact, be hugely profitable, especially for companies that "adopt" popular or pet causes such as endangered species, hunger, breast cancer research, or the environment. Sometimes, as in the case of Pizza Hut's well-known "Book It" promotion, which rewards students with personal pizzas if they

read a certain number of books, or Campbell Soup's "donations" of equipment for schools "in exchange for labels and other proofs of purchase from our family of quality products," schools become willing targets of a company's product-pushing.

No such motivations propelled the CPME or, if any did, they were extraordinarily well-hidden. A 1995 survey conducted by a Boston-based firm that assists companies in tying in to schools unsurprisingly revealed that 93 percent of the CEOs interviewed were motivated by a desire "to build deeper relationships and trust with customers," while 50 percent viewed increased sales as the real goal. But extensive conversations with business-sector CPME participants four years into the partnership yielded a different kind of response. Although expressed in diverse ways, their reaction was a nearly universal assertion that improving the performance of the MCPS support system and thereby strengthening the county's largest and arguably most important institution would inevitably better the climate for business. A large percentage of CPME participants have also found the experience to have been personally and professionally enriching and have stuck with it since 1993.

This enlightened viewpoint was a core feature of the CPME. While not denying the overall primacy of putting up the best possible bottom-line numbers, the corporate participants plunged into their CPME roles intent on making the school system work better. From their success in this would ultimately flow the blessings of an ever-improving economy and civic life in Montgomery County. Interestingly, though, several of the real heavyweights in CPME did not reside in Montgomery County, and their companies had no substantive business interests there apart from the location of their administrative headquarters or regional offices.


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Strictly speaking, the CPME does not fit into any of the formats that describe the school-business nexus. Its participating companies were not bent on bringing about a stem-to-stern reordering of the entire educational system of Montgomery County, nor did they exploit the CPME to advertise their products and services. Their unique arrangements with the schools had no hidden purpose or secret agenda for any kind of corporate takeover. Proof of their long-term commitment to MCPS, although it was certainly not needed, was further illustrated by the establishment of Montgomery SUCCESS, which in effect institutionalized the constructive role of the county's principal businesses in the life of its schools.

With variations tailored to local conditions and ground rules, the CPME endeavor is a promising model for many school districts, including such huge operations as the school system of the city of Philadelphia, which has used corporations to help out in non-academic areas. It may not always be possible to stock a roster with such giants in their fields as Lockheed Martin, Marriott, the Howard Hughes Medical Institute, NationsBank, Guest Services, Computer Sciences Corporation, Bechtel, Vitro, GTE Government Services, IBM Federal Systems, Discovery Communications, and Bell Atlantic, as the CPME was able to do, but in many districts smaller, less well known companies could be of great help. Some of the most impressive work performed during the CPME's four years was done by local or regional firms, including public utility companies, law firms, and a financial services company -- all of them producers of services rather than of goods. In various forms and perhaps with slightly altered mandates, the CPME model is eminently exportable, and school districts would be well-advised to explore following the example of Montgomery County, Maryland.

## THE CORPORATE PARTNERSHIP FOR MANAGERIAL EXCELLENCE

### Teams and Areas of Responsibility

***Communications*** -- *Martin-Schaffer, Inc.*, and *Potomac Electric Power Company* -- dissemination of information about policies, programs, resources, and the performance of the school system, as well as special projects for internal and external audiences.

**Data Operations** -- *Vitro Corporation* -- computer operations and support, data conversion, production services and system support.

**Educational Accountability** -- *Discovery Communications* and *Ferris, Baker Watts, Incorporated* -- program evaluations, management studies, management information development, central records management, policy and regulation development and codification.

**Facilities Management** -- *Bell Atlantic* and *Marriott Corporation* -- design, construction, maintenance, housekeeping, utilities and energy management, and safety concerns.

**Financial Management** -- *GTE Government Systems* and *NationsBank* -- budget analysis and development, accounting, payroll, and management of cafeteria services, nutrition concerns and sales.

**Food Services** -- *Guest Services, Incorporated* -- food purchasing, warehouse management; cafeteria service, nutrition concerns and sales.

**Logistics** -- *Bechtel Corporation* -- purchasing procedures, warehouse management, supply and material distribution, and inventory procedures.

**Personnel** --*Howard Hughes Medical Institute* -- staff recruitment and hiring processes and procedures, staff development and personnel data management.

**Strategic Planning** -- *Lockheed Martin Corporation* -- multiyear financial and expenditures planning, resource allocation, department priority identification and planning, and interdepartmental and interagency methodologies for achieving system and unit goals.

**Total Quality Management** -- *IBM Federal Systems Company* and *Marriott Corporation* -- developing strategies and implementation plans for quality management among all employees.

**Transportation** -- *Computer Sciences Corporation* and *Washington Gas Company* -- fleet maintenance and repair, staff training, transportation operations and safety issues.

In addition, another team developed the final report and the strategy for presentation. This team consisted of representatives from *Shulman, Rogers, Gandal, Pordy & Ecker, P.A., Offbeat Marketing, S.W. Morris and Company, Inc., The Widmeyer Group, Inc., IBM Federal Systems Company* and *Montgomery County Public Schools.*

## About The Institute for Educational Leadership

The Institute for Educational Leadership (IEL) is an independent not-for-profit organization located in Washington, D.C. with affiliated programs in more than 40 states. For over thirty years, IEL has helped develop leadership at the national, state and local levels to improve policy and practice in America's public schools. IEL's work focuses on four priority areas: leadership development; education governance; emerging trends and policy issues; and broadening the coalition in support of public education. In the past decade, IEL has made collaboration between and among sectors and systems more explicitly a key feature across its programs.

Throughout its history, it has brought together diverse constituencies. This publication embodies IEL's efforts to connect education and related human services with the private sector

## About the Author

George R. Kaplan is a veteran analyst of the politics of education. He is a regular contributor to the *Phi Delta Kappan*, *Education Week* and numerous general interest and specialized publications. A former career diplomat and official of the U.S. Office of Education, he directed the Washington Policy Seminar for the Institute for Educational Leadership in the 1970s and has written, lectured, and consulted extensively on education leadership and related topics.

# Appendix 5

G. Resident Teacher Certificate.

(1) The Resident Teacher certificate shall be issued as a part of a 2-year Resident Teacher Program initially for 1 school year and renewable for a second year to an applicant employed to teach in a local school system. A certificate issued to an applicant between:

(a) January 1 and June 30, inclusive, shall be dated January 1; and

(b) July 1 and December 31, inclusive, shall be dated July 1.

(2) An applicant shall meet all of the following requirements. The applicant shall:

(a) Hold a bachelor's degree from an accredited institution with a concentration in a discipline appropriate to an assignment in the elementary or secondary school curriculum;

(b) Present grades of "B" or better in the major area of study;

(c) Present qualifying scores on teacher certification tests approved by the State Board of Education; and

(d) Present official verification by the local superintendent of schools of the completion of 90 clock hours of study before employment as a resident teacher in a Resident Teacher Program developed according to the State Department of Education guidelines.

(3) The 90 clock hours of study set under §G(2)(d) of this regulation may be college course work or a program delivered by the local school system and shall be in all of the following areas:

(a) Human growth and development;

(b) Principles and theories of teaching and learning;

(c) Strategies and models of teaching;

(d) Planning and classroom management skills; and

(e) The Maryland essential dimensions of teaching.

(4) The local superintendent of schools shall file a written request with the State Superintendent of Schools for the issuance of the Resident Teacher certificate after the applicant has met the requirements under §G(2) and (3) of this regulation.

(5) An applicant who holds the Resident Teacher certificate shall be eligible for the Standard Professional certificate upon receipt by the State Department of Education of all of the following items verified by the local superintendent of schools:

(a) 90 clock hours of satisfactory study in the Resident Teacher Program in the area under §G(3) of this regulation;

(b) That the applicant completed a 1-year to 2-year residency with supervision by a supervising teacher or mentor in the Resident Teacher Program;

(c) Satisfactory teaching performance for a minimum of 9 months; and

(d) Qualifying scores on all teacher certification tests approved by the State Board of Education.

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# Appendix 6

# Title 13A
# STATE BOARD OF EDUCATION
## Subtitle 04 SPECIFIC SUBJECTS

### Chapter 01 Program in Technology Education

Authority: Education Article, §2-205(c) and (h), Annotated Code of Maryland

**.01 Requirements for Technology Education Instructional Programs for Grades 9—12.**

A. Each local school system shall offer a technology education program in grades 9—12 which shall enable students to meet graduation requirements and to select technology education electives.

B. Maryland Technology Education Program. The comprehensive instructional program shall provide for the diversity of student needs, abilities, and interests in the high school learning years, and shall include all of the following goals and subgoals:

(1) To demonstrate knowledge and skills regarding diverse technology systems, which includes:

(a) Applications of a variety of technology systems, and

(b) Functioning of a variety of technology systems;

(2) To demonstrate knowledge of the nature of technology, which includes:

(a) The relationships and impacts among technological achievement, the environment, the advancement of science, the individual, and society, and

(b) The evolution of technology resulting from the application of knowledge, tools, and skills to solve practical problems and extend human capabilities;

(3) To demonstrate the ability to solve problems with technology, which includes to:

(a) Use a systems approach,

(b) Employ higher-order thinking skills,

(c) Use collaborative and individual ingenuity,

(d) Use a variety of resources and processes including information, tools, and materials, and



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(e) Demonstrate the ability to work as a team member;

(4) To make ethical decisions about technological issues, which includes to:

(a) Identify problems resulting from technological achievements,

(b) Develop and use technology and technological resources,

(c) Use resources to develop a knowledge base for making informed decisions,

(d) Assess the impact of technology on the individual, society, and the environment, and

(e) Make judgments;

(5) To demonstrate in an experiential setting the safe, effective, and creative use of technological resources, for example, tools, machines, and materials, which includes to:

(a) Create technology for human purposes,

(b) Use technological resources in a safe and responsible manner, and

(c) Demonstrate ingenuity and creativity;

(6) To apply science, mathematics, language arts, social studies, and technological processes and concepts to solve practical problems and extend human capabilities;

(7) To apply knowledge of and perform work tasks representative of technology-based careers including engineers, technologists, technicians, and craftspersons, which includes to:

(a) Identify personal interests and abilities,

(b) Investigate educational opportunities and requirements,

(c) Investigate career opportunities, trends, and requirements, and

(d) Identify and demonstrate factors for employability and advancement;

(8) To recognize the multicultural and gender diversity inherent in the evolution of technology, which includes to:

(a) Recognize the importance of the historical contributions of men and women of different cultures to the advancement of technology, and

(b) Understand the current and future implications of multicultural contributions to the advancement of technology.

**.02 Curriculum Guides.**

Consistent with Education Article, §4-110, Annotated Code of Maryland, each of the local school systems shall provide technology education curriculum guides for the high schools under its jurisdiction.

**.03 Student Participation.**

Each student shall have the opportunity to participate in the technology education program required by this chapter.

**.04 Certification Procedures.**

By September 1, 1994, and each 5 years after that, each local superintendent of schools shall certify to the State Superintendent of Schools that the instructional programming within grades 9—12 meets, at a minimum, the requirements set forth in this chapter.

**Administrative History**

Effective date: July 1, 1970
Regulation .02 amended effective January 15, 1989 (15:27 Md. R. 3132)
Regulations .01 and .02, Family Life and Human Development, repealed effective May 13, 1991 (18:9 Md. R. 1009)

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Regulations .01—.04, Program in Technology Education, adopted effective August 2, 1993 (20:15 Md. R. 1220)

**(The next page is 101)**



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# Appendix 7

By: Chairman, Finance Committee (Departmental - Education)
Introduced and read first time: January 27, 1997
Rule 32(e) suspended
Assigned to: Finance

Committee Report: Favorable with amendments
Senate action: Adopted
Read second time: March 4, 1997

CHAPTER ____

AN ACT concerning

**Workers' Compensation - Students in Unpaid Work-Based Learning Experiences**

FOR the purpose of allowing workers' compensation coverage to students in certain work assignments; establishing the components of unpaid work-based learning experiences; describing the employer of students in certain situations for purposes of workers' compensation coverage~~authorizing county boards to secure workers' compensation coverage for students under certain circumstances~~; and generally relating to workers' compensation coverage for students in unpaid work assignments.

BY adding to
Article - Education
Section 7-112
Annotated Code of Maryland
(1997 Replacement Volume)

BY repealing and reenacting, with amendments,
Article - Labor and Employment
Section 9-228
Annotated Code of Maryland
(1991 Volume and 1996 Supplement)

SECTION 1. BE IT ENACTED BY THE GENERAL ASSEMBLY OF MARYLAND, That the Laws of Maryland read as follows:

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**Article - Education**

7-112.

(A) IN THIS SECTION, A "UNPAID WORK-BASED LEARNING EXPERIENCE" MEANS A PROGRAM THAT PROVIDES STUDENTS WITH STRUCTURED EMPLOYER-SUPERVISED LEARNING THAT:

(1) OCCURS IN THE WORKPLACE;

(2) LINKS WITH CLASSROOM INSTRUCTION; AND

(3) IS COORDINATED BY A COUNTY BOARD OF EDUCATION.

(B) A STUDENT WHO HAS BEEN PLACED WITH AN EMPLOYER IN AN UNPAID WORK-BASED LEARNING EXPERIENCE COORDINATED BY A COUNTY BOARD OF EDUCATION IS A COVERED EMPLOYEE, AS DEFINED IN TITLE 9 OF THE LABOR AND EMPLOYMENT ARTICLE, OF THE EMPLOYER FOR THE PURPOSES OF WORKERS' COMPENSATION.

(C) COMPENSATION FOR INJURY OR DEATH TO A STUDENT UNDER THIS SECTION SHALL BE BASED ON THE FEDERAL MINIMUM WAGE IN EFFECT AT THE TIME OF THE STUDENT'S INJURY TIMES THE AVERAGE NUMBER OF HOURS PER WEEK THE STUDENT SPENDS IN AN UNPAID WORK-BASED LEARNING EXPERIENCE.

**Article - Labor and Employment**

9-228.

(a) (1) A handicapped student is a covered employee while working for an employer without wages in a work assignment in accordance with § 8-402 of the Education Article.

(2) For the purposes of this title, the employer for whom the handicapped student works is the employer of the handicapped student.

(b) (1) An individual is a covered employee while working as a student intern or student teacher under § 6-107 of the Education Article.

(2) For the purposes of this title, the Board of School Commissioners of Baltimore City or the board of education for any other county is the employer of an individual who is a covered employee under this subsection in that county.

(C) (1) A STUDENT IS A COVERED EMPLOYEE WHEN THE STUDENT HAS BEEN PLACED WITH AN EMPLOYER IN AN UNPAID WORK-BASED LEARNING EXPERIENCE COORDINATED BY A COUNTY BOARD OF EDUCATION UNDER § 7-112 OF THE EDUCATION ARTICLE.

(2) FOR PURPOSES OF THIS TITLE, THE EMPLOYER FOR WHOM THE STUDENT WORKS IN THE UNPAID WORK-BASED LEARNING EXPERIENCE IS THE EMPLOYER OF THE STUDENT.

(3) COMPENSATION FOR INJURY OR DEATH TO A STUDENT UNDER THIS SUBSECTION SHALL BE BASED ON THE FEDERAL MINIMUM WAGE IN EFFECT AT THE

TIME OF THE STUDENT'S INJURY TIMES THE AVERAGE NUMBER OF HOURS PER WEEK THE STUDENT SPENDS IN AN UNPAID WORK-BASED LEARNING EXPERIENCE.

SECTION 2. AND BE IT FURTHER ENACTED, That this Act shall be applicable to all students in unpaid work-based learning experiences as of the beginning of the 1997-1998 school year.

SECTION 3. AND BE IT FURTHER ENACTED, That this Act shall take effect July 1, 1997.

**SB 394**

**Department of Fiscal Services**
Maryland General Assembly

## FISCAL NOTE

Senate Bill 394 (Chairman, Finance Committee)
(Departmental - Education)
Finance

**Workers' Compensation - Students in Unpaid Work-Based Learning Experiences**

This departmental bill provides workers' compensation coverage for students in unpaid work-based learning experiences by defining them as covered employees for the purposes of workers' compensation. An unpaid work-based learning experience is defined as one that: occurs in the workplace, links with classroom instruction, and is coordinated by a county board of education. The bill takes effect July 1, 1997.

### Fiscal Summary

**State Effect:** Minimal increase in expenditures by State agencies for workers' compensation costs if students in unpaid work-based learning experiences are placed in these agencies. Minimal increase in off-budget expenditures and revenues of Injured Workers' Insurance Fund (IWIF) related to claims by these students.

**Local Effect:** Minimal increase in expenditures by local governments for workers' compensation costs if students in unpaid work-based learning experiences are placed in the local government.

**Small Business Effect:** The State Department of Education (MSDE) has determined that this bill has minimal or no impact on small businesses (attached). Fiscal Services concurs with this assessment as discussed below.

## Fiscal Analysis

**State Expenditures:** To the extent that State agencies accept students for unpaid work-based learning experiences, the State would be required to provide workers' compensation coverage for these students. This would result in a minimal increase in expenditures of all fund types. Coverage would be provided by IWIF, an off-budget State agency that provides workers' compensation coverage to the State and other employers. IWIF reports that its administrative and claims costs would increase by approximately $246,000 per year, which would be reflected in higher premiums for insured employers covering such students. This estimate is based on 50 medical claims and 15 benefit claims per year; actual costs will vary higher or lower based on actual experience.

**Local Expenditures:** To the extent that local governments accept students for unpaid work-based learning experiences, the employer would be required to provide workers' compensation coverage for these students, resulting in a minimal increase in expenditures.

**Small Business Effect:** MSDE estimates minimal or no impact on small businesses. Employers will be required to provide workers' compensation coverage to unpaid student workers and premiums could increase slightly in the event that additional claims are made against the policy. MSDE estimates, however, that these employers will benefit from protection against tort suits when unpaid student workers are injured at the job site. MSDE estimates that small businesses will not bear disproportionate financial burdens or suffer non-competitive consequences as a result of this legislation. Fiscal Services generally concurs with MSDE's estimates. Fiscal Services notes, however, that even if these unpaid student workers do not file workers' compensation claims, there may be additional costs to the employer simply for providing workers' compensation coverage to an additional person.

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**Information Source(s):** Injured Workers' Insurance Fund, Subsequent Injury Fund, Uninsured Employers' Fund, Workers' Compensation Commission, Department of Fiscal Services

**Fiscal Note History:** First Reader - February 6, 1997
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Analysis by: Matthew D. Riven
Reviewed by: John Rixey

Direct Inquiries to:
John Rixey, Coordinating Analyst
(410) 841-3710
(301) 858-3710

# Appendix 8

January 6, 1998

Mr. Gene Counihan, Chairman
90 State Circle
Annapolis, Maryland 21401

Dear Chairman Counihan:

A major portion of the Task Force report involves recommendations and suggestions addressed to the State Department of Education. The fact that I am a member of the State Board places me, if I am to sign our report, in the difficult position of asking that I join with my colleagues on the Board to consider proposals that I have officially endorsed. This conflict leads me to recuse myself from voting on the final product of the Task Force. I want to make clear, however, that this in no way suggests that I am in disagreement with the findings in the report. I also recognize that this recusal may seem strange - even a bit foolish - in view of the fact that I participated freely in the deliberations of the subcommittee on which I served. This is hardly an earth-shaking issue, but I feel more comfortable in resolving it in this way, for my own peace of mind.

Sincerely,

Walter Sondheim

Walter Sondheim

WS/ncs

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